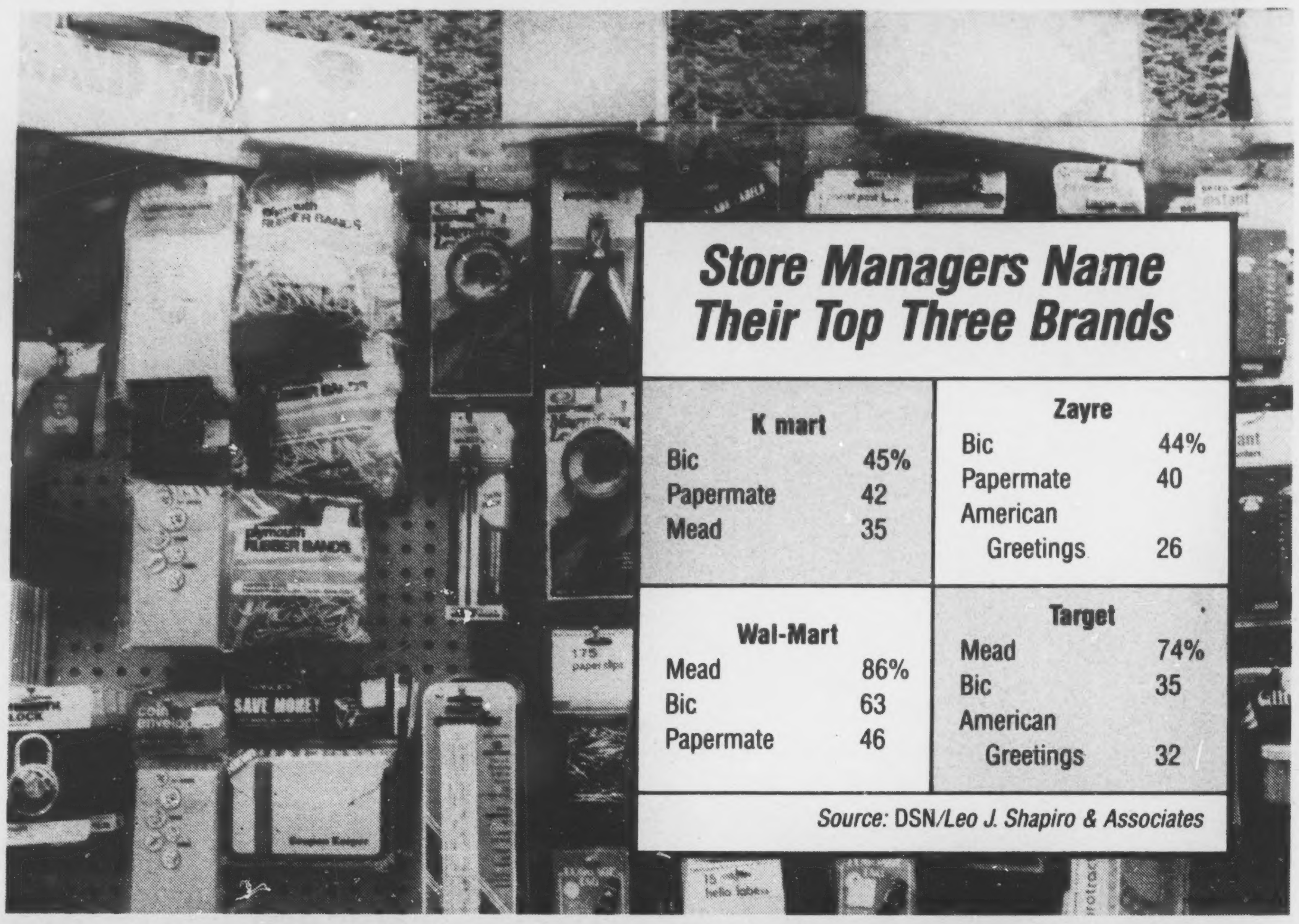
Stationery

Top Brands Differ by Region

Brands	Northeast	South	North Central	West
Mead	37%	52%	61%	58%
Bic	60	49	45	65
Papermate	51	44	26	54
American Greetings	25	22	21	14
Parker	10	9	14	20
Scripto	20	9	14	12
Crayola	13	15	12	5
Pentel	6	10	6	8
Sheaffer	8	8	5	9
Store brand/PL	9	11	11	12

Source: DSN/*Leo J. Shapiro & Associates*



Store Managers Name Their Top Three Brands

K mart		**Zayre**	
Bic	45%	Bic	44%
Papermate	42	Papermate	40
Mead	35	American Greetings	26

Wal-Mart		**Target**	
Mead	86%	Mead	74%
Bic	63	Bic	35
Papermate	46	American Greetings	32

Source: DSN/*Leo J. Shapiro & Associates*

Stationery

(Continued from page 33)

agers mentioning it, it took fourth place.

American Greetings was among the top five brands at Wal-Mart, Zayre and Target. But it was mentioned as a best seller by only 3.5% of K mart managers.

Similarly, Parker scored high with three of the chains surveyed individually, but the brand didn't show much strength with Target managers. Just 1% of them named Parker as a best seller and 8% named Scripto. That meant the strongest brands in pens at Target were Bic, Papermate and Pentel—in that order.

Area of Reliance

Store brand/private label turned in a strong performance in the stationery area. Managers of "all" discount chains, 11% of them, mentioned it as a best seller. Store brand programs got a much heavier response from managers at conventional chains. Of them, 11% named store brands as a best seller, compared to just 6% of the managers at upscale chains.

Managers at two chains reported their store brands as particularly strong—K mart and Zayre.

At Zayre 22% of the chain's managers named the store brand as a best seller. That number was large enough to make the Zayre store brand in stationery the fourth ranking in the department.

K mart's managers mentioned the store brand frequently enough to rank it the fifth best-selling brand in the department. The store brand was named by 20%.

Store brand/PL scored much lower at Wal-Mart and Target. The store brand was named a best seller by only 3% of their respective store managers.

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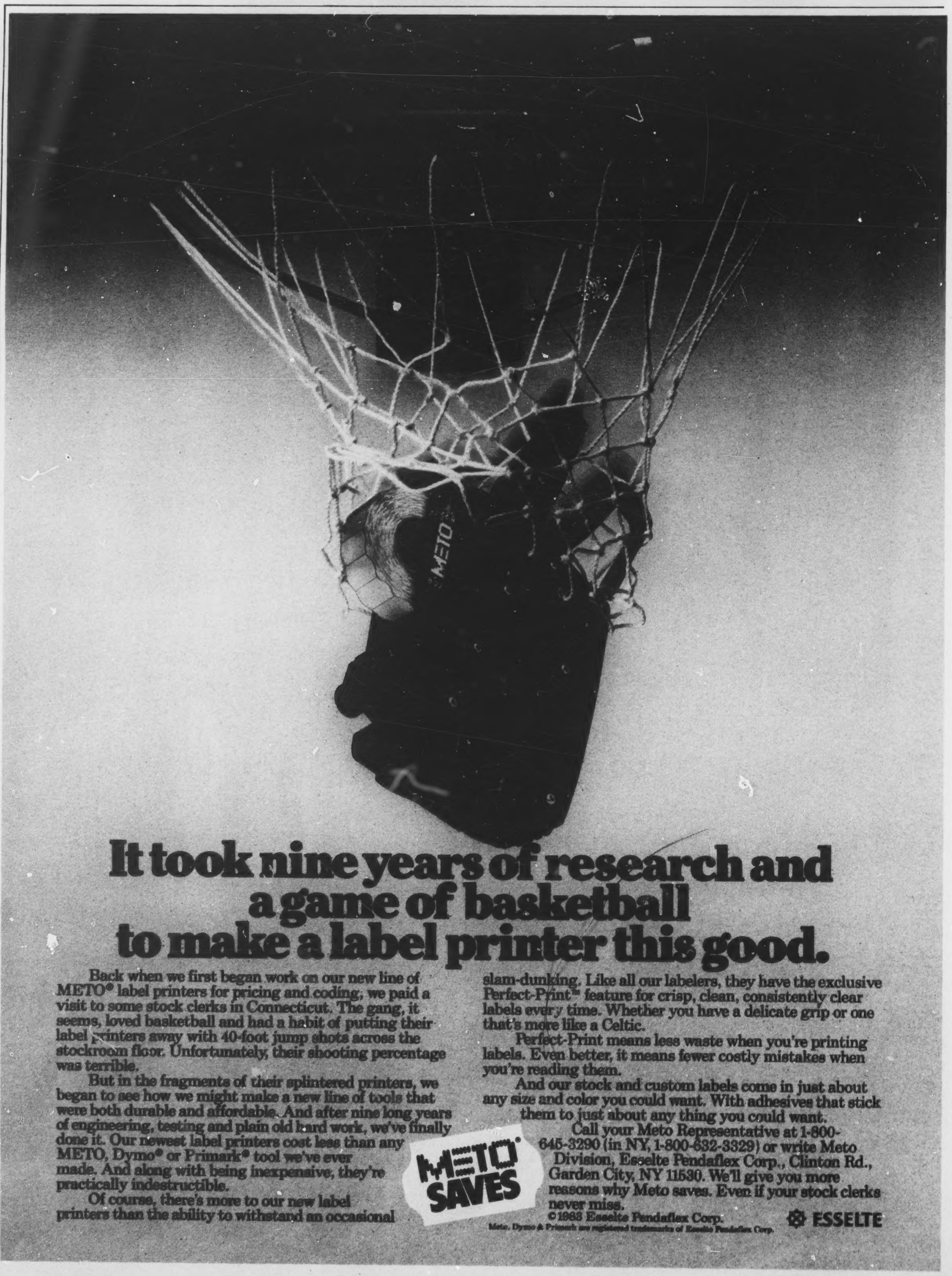

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Leaders Reflect a Variety of Categories

The variety of categories represented among automotive's top brands demonstrates the department's broad-based sales draw.

Quaker State, mentioned by 63% of all store managers polled and well entrenched in automotive's top spot, led five other oils on the top brands list—Pennzoil, Valvoline, Havoline, Mobil and Exxon—the highest of these having been named by managers 39% of the time. However, brands of chemicals, replacement parts, batteries and waxes also scored high.

Just as Quaker State dominated the oil segment, Champion, named by 39% of store managers and the second leading brand overall, ran away with replacement parts honors.

Fram, fifth overall, scored closest to Champion, by being named 23% of the time. Lee, at 15% and ninth overall, barely edged Autolite's 13% level for third position among replacement parts, and left motorcraft at 5%.

Prestone was the leading chemical to make the top brands list at 16%, beating STP's 14% level of mentions. Prestone took eighth place among the leading automotive brands.

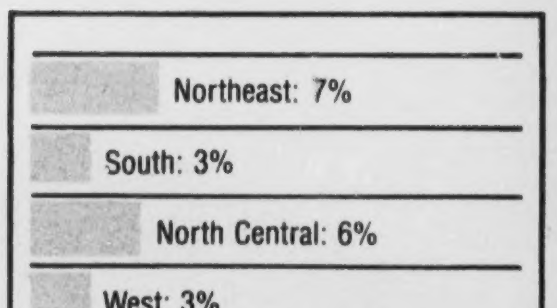
AC-Delco was the leading battery brand; at 23% it was rated fourth overall by store managers. Turtle Wax, at 12%, was the lone auto body care item to make the list.

Significantly, the top five brands represented three diverse product segments.

Although managers at conventional and upscale chains agreed on Quaker State as their respective top brand, they differed widely on the 10 next most important brands. For instance, AC-Delco fared better than twice as well among upscale discounters than at conventional chains.

For most others, however, traditional outlets were the kindest. Fram was mentioned five times more often, Prestone and STP four times as frequent, and Lee and Autolite roughly double the number of times at conventional stores.

(Continued on page 44)



In automotive, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the Northeast—7%. *Source:* DSN/*Leo J. Shapiro & Associates*

Automotive

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Quaker State	67%	70%	51%
Champion	39	41	30
Pennzoil	39	39	37
AC-Delco	23	19	44
Fram	23	26	5
Valvoline	18	17	22
Havoline	16	16	20
Prestone	16	18	4
Lee	15	16	9
STP	14	16	4
Autolite	13	14	6
Turtle Wax	12	13	11
Mobil	8	5	23
Motorcraft	5	4	13
Exxon	5	6	—
Store brand/PL	4	4	—

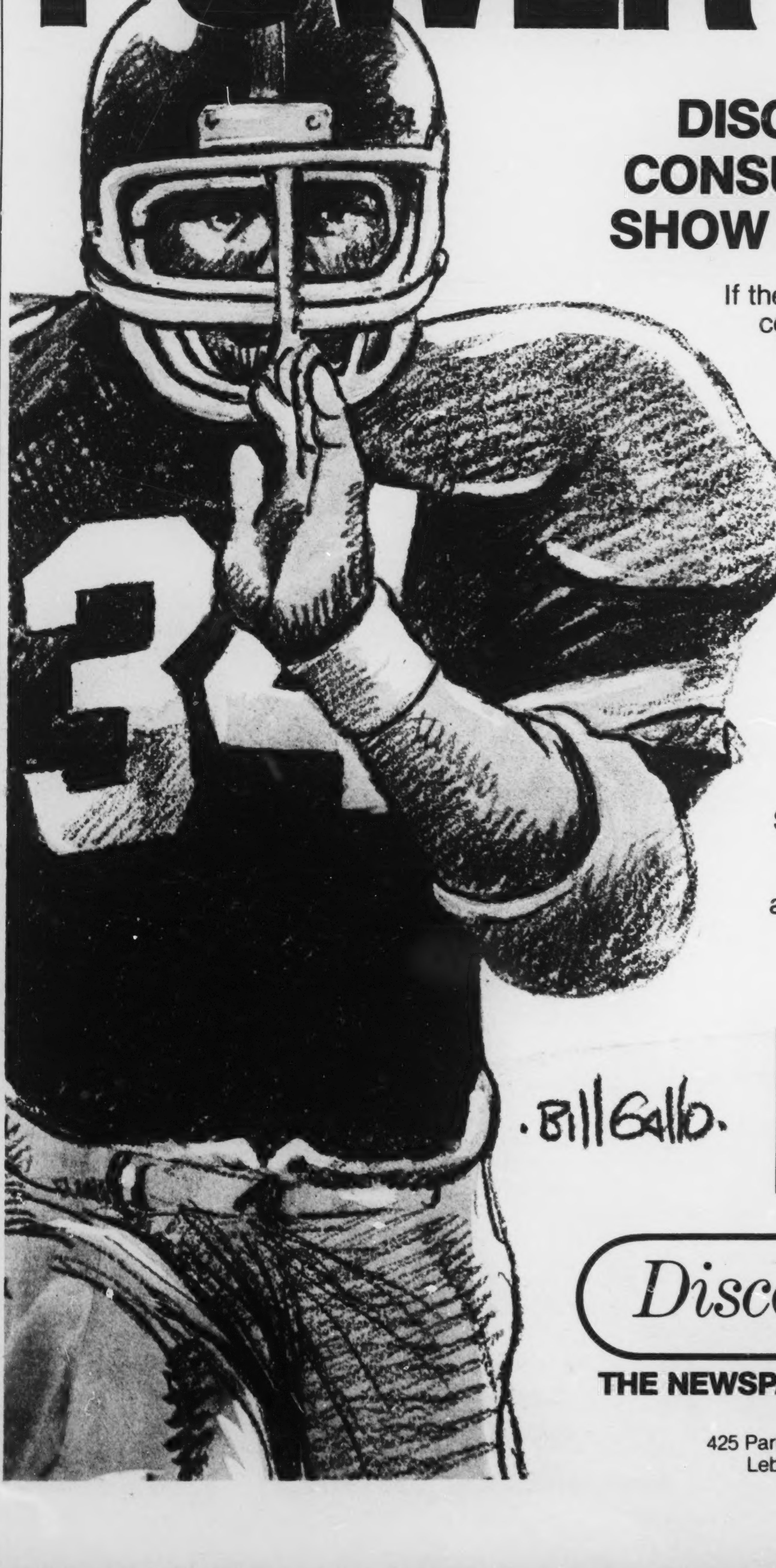
Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Quaker State	50%	68%	93%	44%
Champion	23	43	58	29
Pennzoil	24	77	4	41
AC-Delco	15	20	5	46
Fram	28	69	4	—
Valvoline	7	34	11	21
Havoline	11	31	7	18
Prestone	14	14	30	5
Lee	3	—	56	—
STP	13	23	4	5
Autolite	6	18	7	5
Turtle Wax	11	12	7	8
Mobil	—	—	3	21
Motorcraft	2	11	—	16
Exxon	3	3	41	—
Store brand/PL	11	—	7	—

Source: DSN/*Leo J. Shapiro & Associates*

POWER PLAY



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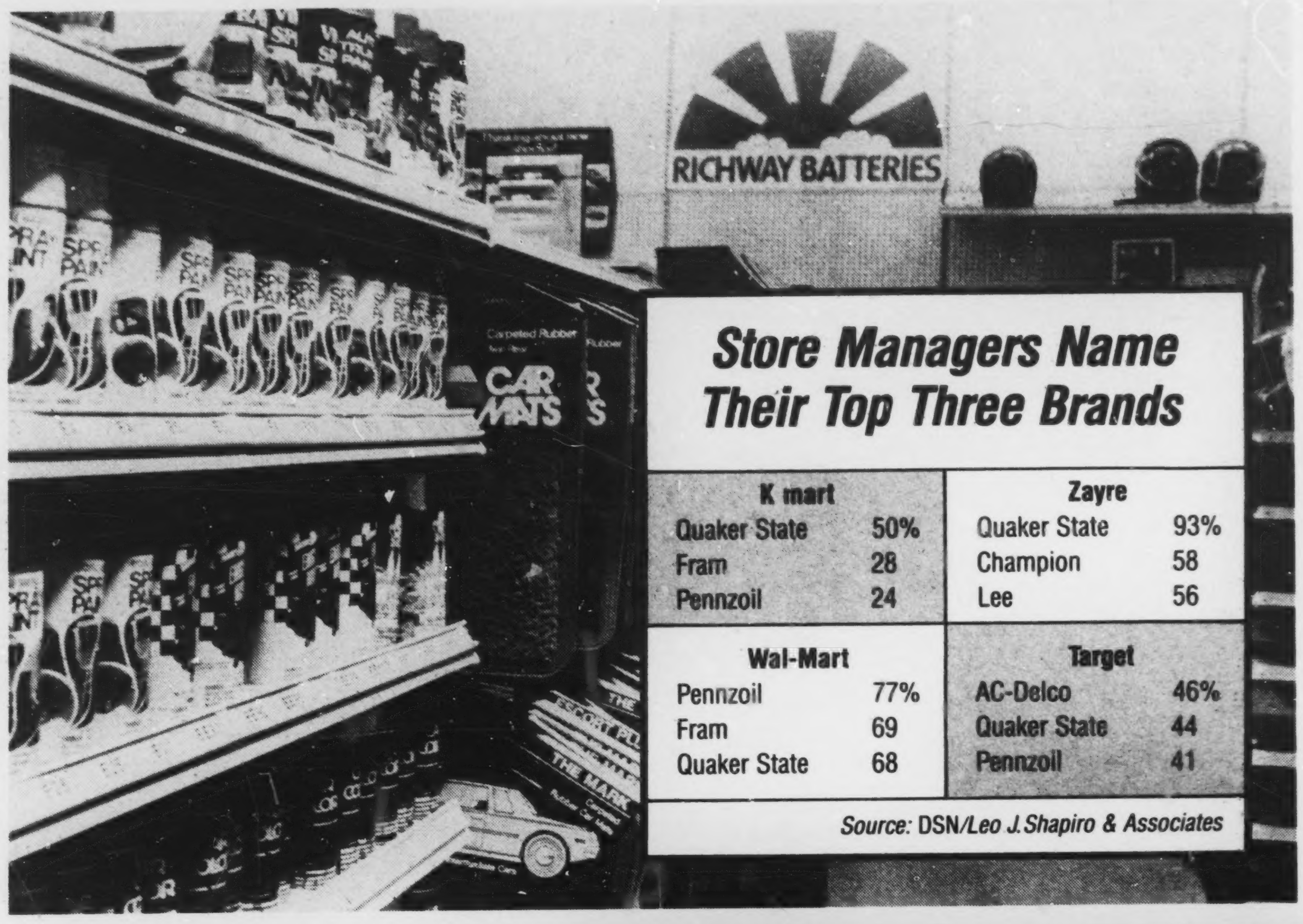
Automotive

Top Brands Differ by Region

Brands	Northeast	South	North Central	West
Quaker State	73%	71%	63%	58%
Champion	43	38	35	42
Pennzoil	13	31	44	66
AC-Delco	18	21	33	15
Fram	6	26	20	37
Valvoline	16	22	15	18
Havoline	3	23	15	20
Prestone	21	11	11	26
Lee	27	14	10	11
STP	11	21	11	10
Autolite	12	12	9	21
Turtle Wax	20	10	10	12
Mobile	18	3	10	2
Motorcraft	9	2	8	3
Exxon	9	8	4	—
Store brand/PL	3	2	6	3

Source: DSN/*Leo J. Shapiro & Associates*



Store Managers Name Their Top Three Brands

K mart		Zayre	
Quaker State	50%	Quaker State	93%
Fram	28	Champion	58
Pennzoil	24	Lee	56
Wal-Mart		**Target**	
Pennzoil	77%	AC-Delco	46%
Fram	69	Quaker State	44
Quaker State	68	Pennzoil	41

Source: DSN/*Leo J. Shapiro & Associates*

Automotive

(Continued from page 43)

In the No. 2 slot, Champion and Pennzoil at about 40% were nose-to-nose in conventional stores, and the next overall brand, AC-Delco, rushed past them by a wide margin at upscalers.

When store managers at four leading chains were asked to name their three top selling brands, only two, K mart and Zayre, placed Quaker State at the head of the list, albeit with considerable support—respective 50% and 93% incidences of mention.

On the other hand, Wal-Mart managers put Pennzoil in first place, as Target managers did with AC-Delco. However, managers named these brands comparatively fewer times—77% and 45%, respectively.

Adding It Up

Indeed, Quaker State surfaced as one of the top three suppliers at each of the top four chains polled. Pennzoil made the grade at 3 out of 4. With just 4% of Zayre managers mentioning it, the brand took 12th place there.

Fram was among the top three brands at K mart and Wal-Mart. But, it was mentioned as a best seller by only 4% of Zayre managers.

Similarly, Champion and Lee scored high with Zayre managers, but were mentioned as best sellers far fewer times by other leading chains.

Notably, store brands and private label turned in an overall good performance in automotive. Among managers of all discount chains polled, 4% of them mentioned it as a best seller.

Store brand programs, however, found greater strength among 11% of K mart managers and 7% of Zayre managers polled. Indeed, at K mart, private label was named as the eighth strongest brand by managers; at Zayre, it tied for the seventh spot.

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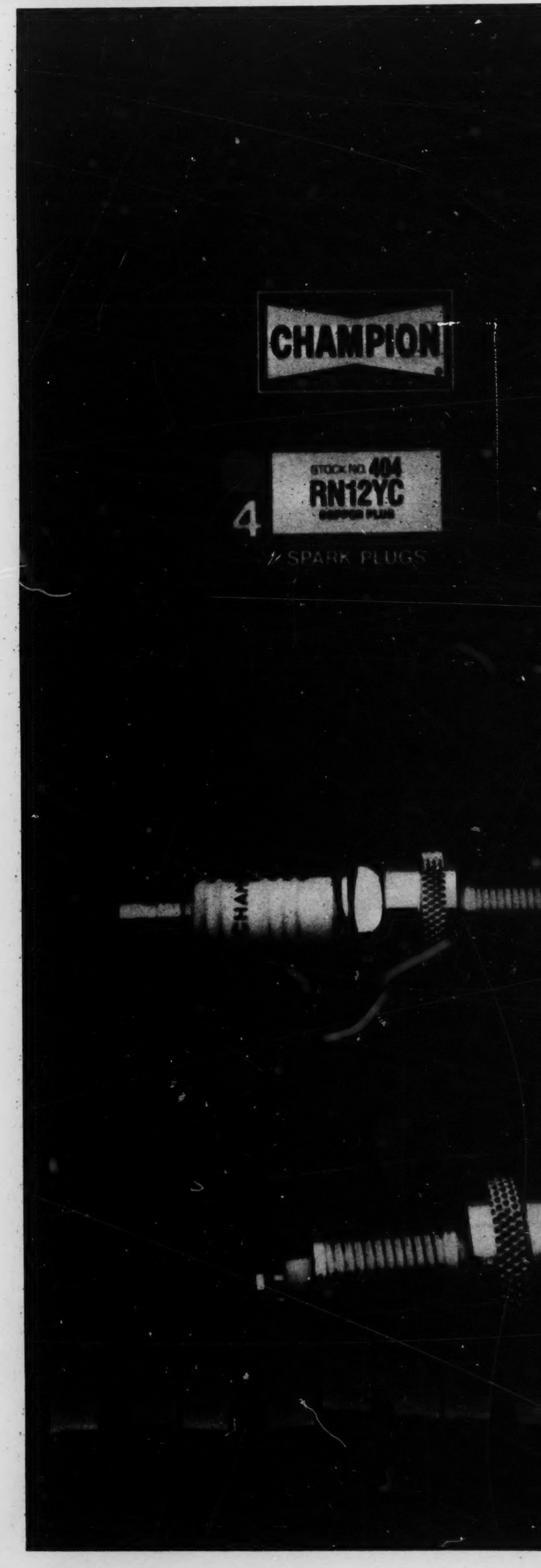


Top Brands Differ at Old-liners, Upscalers

Cosmetics

Top Brands Vary by Type of Outlet

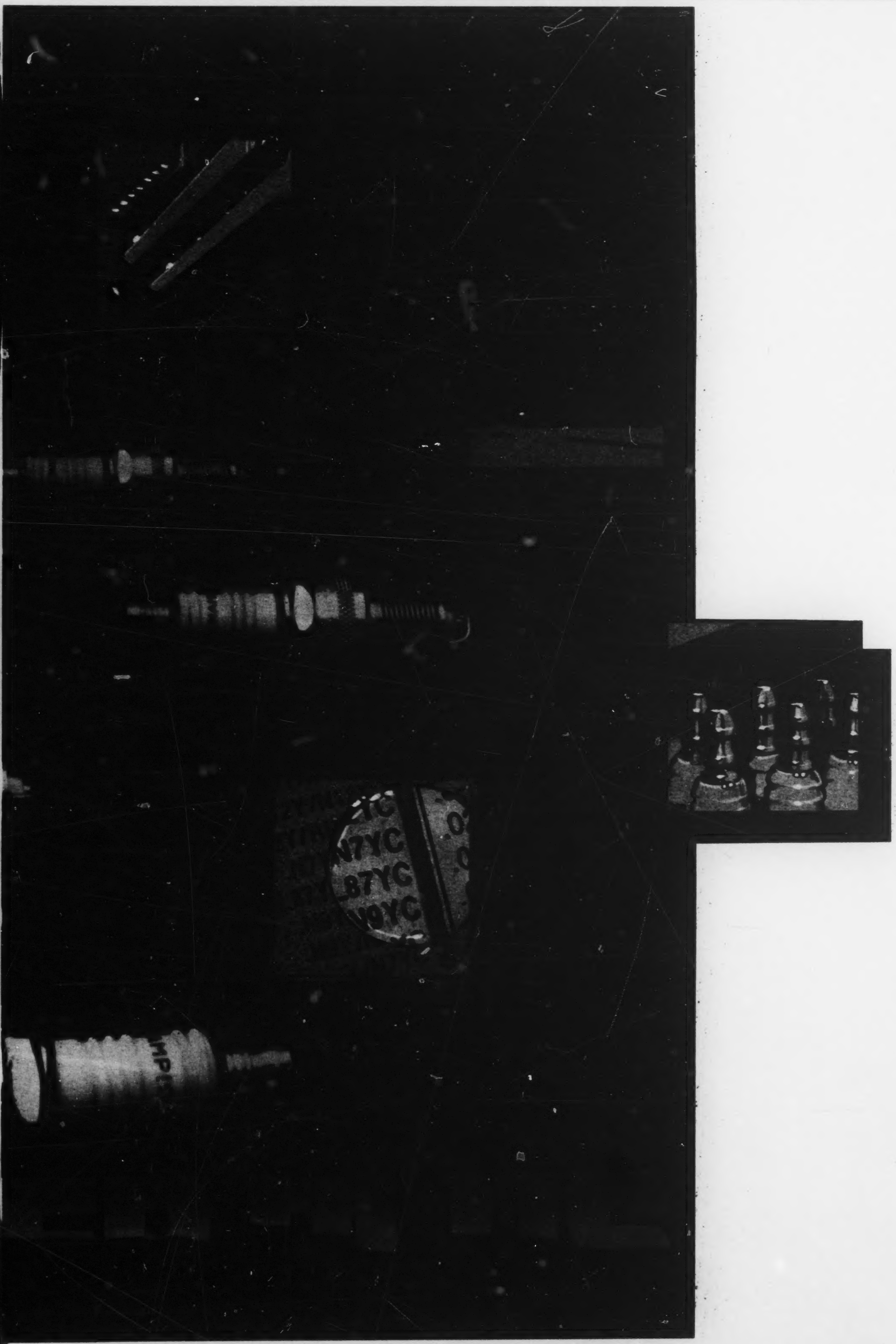
Brands	All Discounters	Conventional Discounters	Upscale Discounters
Maybelline	83%	83%	81%
Revlon	70	65	96
Cover Girl	51	52	46
Max Factor	50	47	67
Aziza	19	14	41
L'Erin	12	11	18
L'Oreal	12	14	4
Noxell	9	9	11
Coty	8	9	5

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Maybelline	94%	80%	89%	84%
Revlon	63	89	58	95
Cover Girl	59	41	51	54
Max Factor	53	37	44	69
Aziza	6	14	49	39
L'Erin	16	11	5	11
L'Oreal	19	6	4	5
Noxell	25	6	5	13
Coty	1	3	4	3

Source: DSN/*Leo J. Shapiro & Associates*



What emerges from the list of best-selling brands in cosmetics departments is that the conventional chains and the upscale chains appear to be moving in separate directions.

Four brands—Maybelline, Revlon, Cover Girl and Max Factor—went to the head of the pack among all discounters; Aziza took fifth place in the departmental lineup.

However, the positions of the two top-selling brands—Maybelline and Revlon—were reversed when the responses of store managers from conventional vs. upscale chains were tallied.

A total of 83% of store managers, from all types of discounters, responded that their top brand was Maybelline. At conventional chains Maybelline stayed at the top of the list, with 83% stating the line was their store's top brand.

Managers at upscale stores had something else to say: 96% named Revlon as the top-ranking brand. At the upscale-type outlet, Maybelline was ranked second.

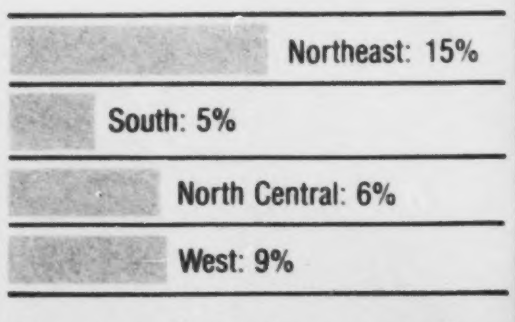
Virtually the entire list of top brands in cosmetics shows this divergent pattern between conventional and upscale stores. With Max Factor and Aziza, ranking four and five overall this conventional/upscale parting of the ways is in sharper focus.

Figures Analyzed

Max Factor was the fourth best-selling brand by 47% of conventional store managers, but 67% of the store managers at upscale chains named this brand as a top seller, ranking it third among the upscalers.

Aziza ranked fourth among the conventional and upscale chains, but 41% of the upscale store managers named the line as a best seller compared to only 14% of the managers at conventional chains.

Target and Wal-Mart were the two chains with store managers naming Revlon as the best-selling line in the department. K mart and Zayre managers put Maybelline on top.



In cosmetics, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the Northeast—15%. ***Source:*** **DSN/** ***Leo J. Shapiro & Associates***

Dentifrices, Hair Care Dominate Listing

Health & Beauty Aids

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Crest	46%	46%	44%
Colgate	34	32	41
Johnson & Johnson	33	32	37
Revlon	31	30	38
Clairol	25	27	17
Procter & Gamble	21	21	24
Listerine	11	10	15
Scope	8	9	2
Store brand/PL	1	1	—

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Crest	40%	58%	45%	37%
Colgate	25	37	52	33
Johnson & Johnson	30	48	22	38
Revlon	25	48	34	44
Clairol	47	17	9	21
Procter & Gamble	19	14	20	27
Listerine	7	12	19	18
Scope	3	12	11	—
Store brand/PL	—	—	—	—

Source: DSN/*Leo J. Shapiro & Associates*

The top brands named in health & beauty aids are a reflection of the weight discounters give dentifrices and hair care products.

Each of the top eight brands mentioned by store managers as best-selling falls into one or the other of these categories, with the exception of Johnson & Johnson, which is both hair care and baby products.

No brands in other staple areas—such as analgesics, deodorants or feminine hygiene—were mentioned frequently enough to make the list of the top eight brands.

Predictably, two heavily promoted toothpaste brands went to the head of the class. Crest was named by all store managers, including managers of the conventional and upscale chains, as the top brand in the department. Coming in second for all types of outlets was Colgate.

The Crest vs. Colgate duel turned up as more toe-to-toe at the upscale chains where these two brands were mentioned by store managers as best sellers by 44% and 41%, respectively.

The gap between these two brands was wider at conventional chains. There, 46% of the store managers responded Crest was the best seller; 32% said Colgate.

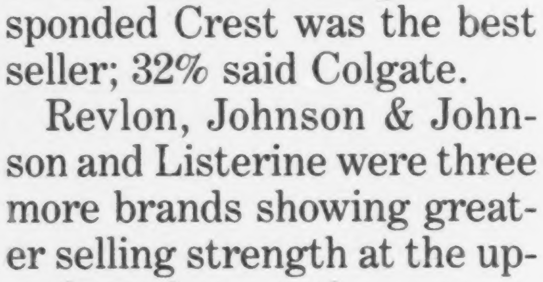
Revlon, Johnson & Johnson and Listerine were three more brands showing greater selling strength at the upscalers than at the conventional outlets.

Clairol and Scope were mentioned as best sellers more frequently by managers of conventional chains.

Although Crest was the leading brand in the "all" discounters consensus, the store managers at the individual chains came up with a different top-selling brand.

K mart managers, 47% of them, gave the top spot to Clairol; 52% of Zayre's managers mentioned Colgate, and 44% of Target's managers said the top brand was Revlon. Only Wal-Mart's managers, 58% of them, said Crest was the dominant brand at their chain.

(Continued on page 51)



In health & beauty aids, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the North Central States—22%. *Source:* DSN/*Leo J. Shapiro & Associates*

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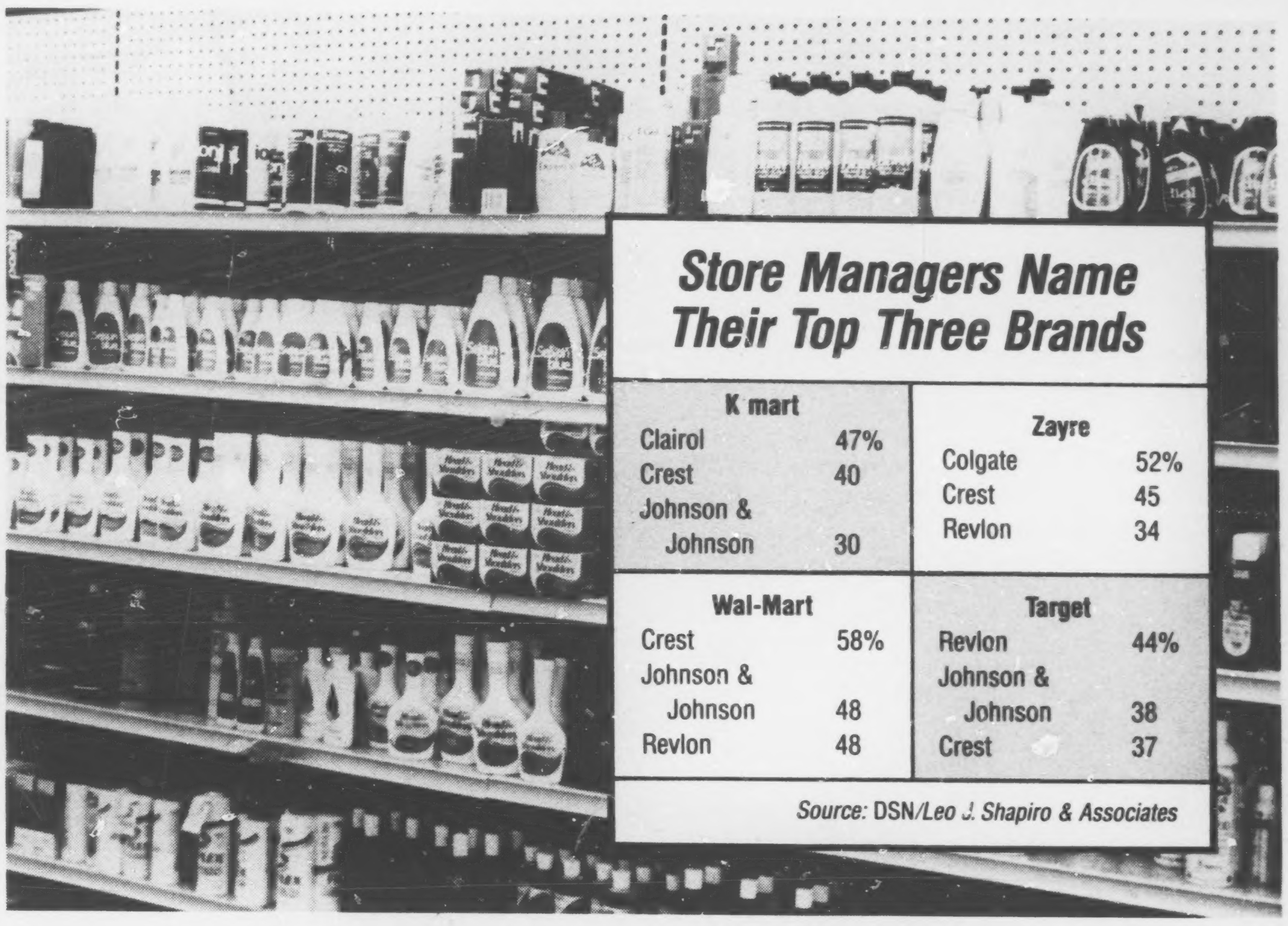
Health & Beauty Aids

Top Brands Differ by Region

Brands	Northeast	South	North Central	West
Crest	40%	51%	46%	40%
Colgate	42	42	30	19
Johnson & Johnson	29	29	27	50
Revlon	30	30	33	30
Clairol	24	21	24	35
Procter & Gamble	23	21	16	29
Listerine	11	13	10	7
Scope	13	6	9	4
Store brand/PL	—	—	2	—

Source: DSN/Leo J. Shapiro & Associates



Store Managers Name Their Top Three Brands

K mart	
Clairol	47%
Crest	40
Johnson & Johnson	30

Zayre	
Colgate	52%
Crest	45
Revlon	34

Wal-Mart	
Crest	58%
Johnson & Johnson	48
Revlon	48

Target	
Revlon	44%
Johnson & Johnson	38
Crest	37

Source: DSN/Leo J. Shapiro & Associates

H&BA

(Continued from page 46)

A look at the top three brands at these major chains shows Crest is the only brand that turned up consistently on each chain's list.

Two brands in mouthwashes—Listerine and Scope—were mentioned as top sellers frequently enough to make the top eight listing.

More store managers at the upscale chains mentioned Listerine as a best seller than mentioned Scope. At upscale chains 15% mentioned Listerine; 2% said Scope.

Listerine and Scope ran almost neck-and-neck among conventional store managers.

Polling store managers on health & beauty aids turned up a couple of surprises. One of them was in response to the question: name departments in which the number of national brands increased this past year.

Further Developments

Store managers, on a regional basis, came up with totally different views of brand growth.

Managers in the Northeast and South saw little brand growth, with just 5% and 10% of the store managers, respectively, naming health and beauty aids.

Contrast those numbers to the 19% of store managers in the South and 22% in the North Central area who named health and beauty aids.

These heavy mentions coming from the South and North Central regions are surprisingly high since health and beauty aids is a department traditionally heavily populated by top national brands. The 19% and 22% mentions aren't that far from mentions of other areas where brands are known to be on the increase, namely men's apparel with 23% mentions and ladies' apparel with 26% mentions.

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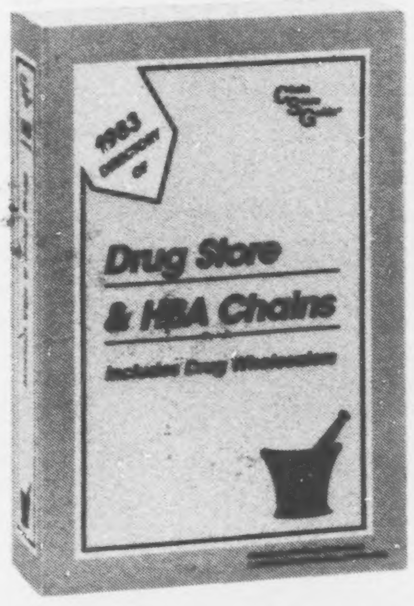

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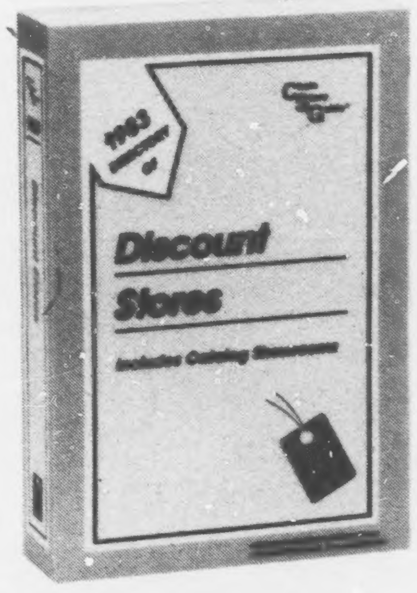

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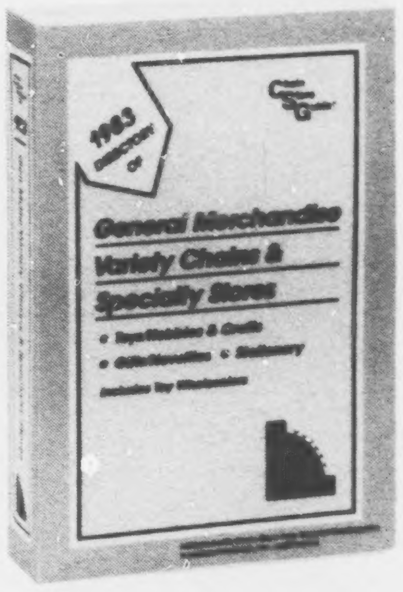

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Signature ________
Product Sold ________ Date ________

☐ Bill company (subject to credit approval)
☐ Check enclosed ☐ Send C.O.D.
☐ Please charge: ___American Express ___Visa ___Mastercard
A/C# ________
Expiration date ________

Please add applicable sales tax (N.Y./Calif.) and $2.50 shipping & handling per shipment. Prices subject to change.

Five Suppliers Share Top Honors

Food, Candy, Snacks

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
M&M	49%	48%	53%
Planters	46	46	49
Frito-Lay	41	44	27
Hershey's	40	39	45
Brach's	26	29	15
Nabisco	16	15	21
Mars	16	13	29
Pepsi	13	11	22
Whitman	10	11	2
Coke	10	8	19
Fisher	8	7	13
Store brand/PL	2	2	2

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
M&M	45%	45%	48%	54%
Planters	50	57	37	44
Frito-Lay	45	63	52	31
Hershey's	31	49	33	48
Brach's	17	60	—	11
Nabisco	19	37	10	26
Mars	11	6	11	33
Pepsi	2	3	35	27
Whitman	27	—	—	3
Coke	1	9	—	23
Fisher	5	—	4	16
Store brand/PL	—	—	9	3

Source: DSN/*Leo J. Shapiro & Associates*

Snacks and candies are favorite foods of the nation's discounters.

Discount store managers named snack and candy suppliers 11 times out of 12 as providing their best-selling foods. The other leading food supplier, Nabisco, ranked sixth on the list.

Although nearly one discounter in two named M&M and Planters as his best-selling food brands, the rankings of other leaders varied by store format.

For instance, Frito-Lay, Brach's and Whitman were markedly stronger in conventional stores like K mart, Wal-Mart and Zayre than in upscale chains.

All store managers polled named five suppliers consistently as their top sellers, regardless of store format—Planters, M&M, Frito-Lay, Brach's and Hershey's.

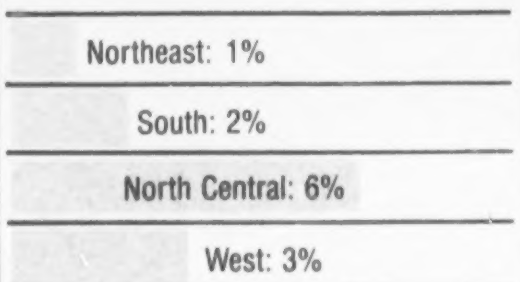
Coincidentally, the majority of managers who mentioned the top five brands most frequently also predicted overall store sales gains of more than 10% for 1983. As might be expected, these managers also reported an increase in the number of national brands carried in the food department this year.

However, store managers predicting 10%-plus sales growth this year cited the next tier of brands, including soft drink promotional leaders Pepsi and Coke, as best sellers considerably fewer times.

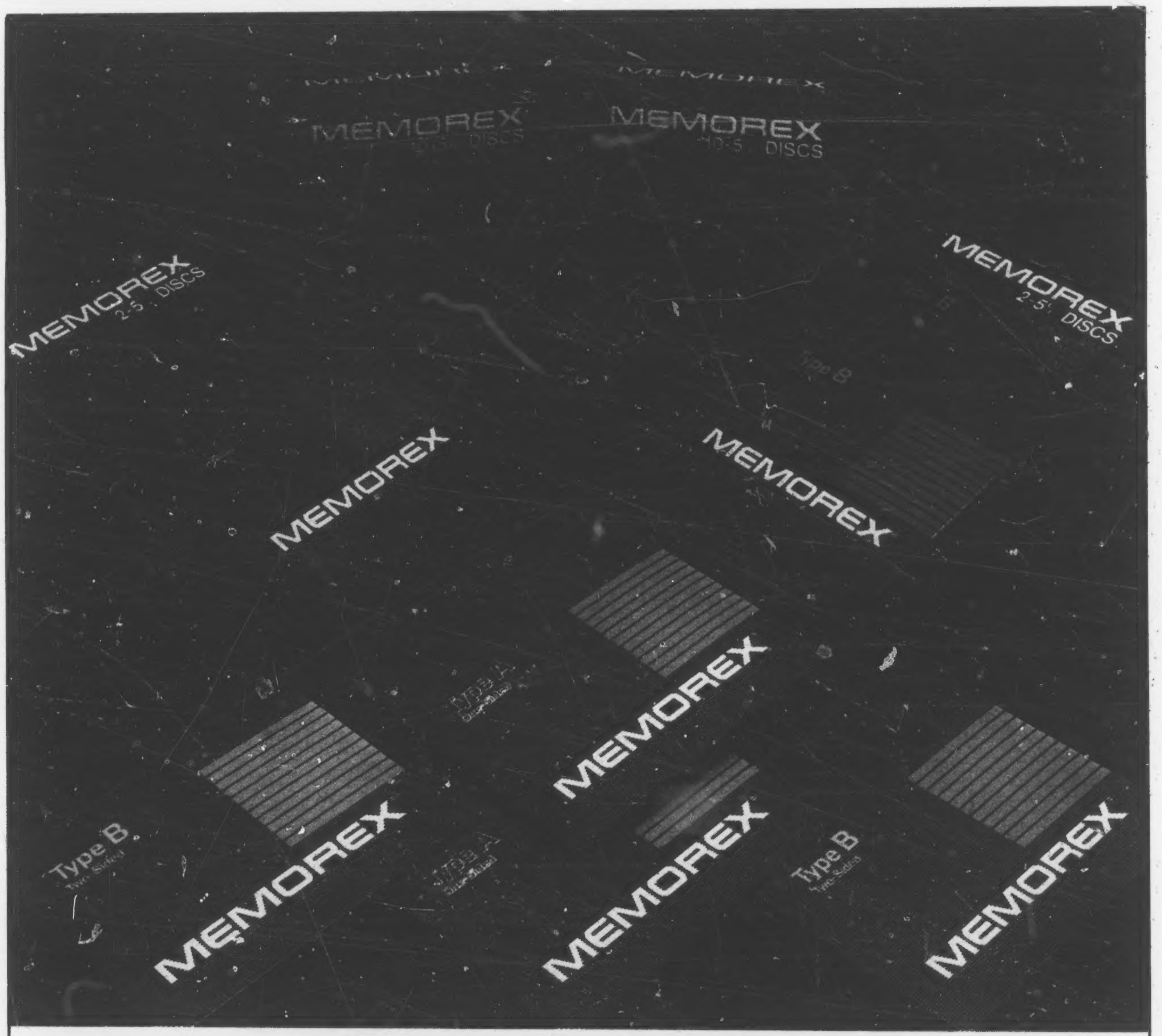
Brand mentions also varied among the top chains.

More than twice the percentage of Wal-Mart store managers named Frito-Lay as a prime performer than did Target managers. Even more diverse, nearly 60% of Wal-Mart managers cited Brach's, compared with a mere 17% at K mart and 10% at Target.

Since discounters generally position their food departments as traffic builders, brand names have a greater significance in this area of the store. Consumables sections marked by limited varieties of highly recognizable brand names leave little room for private label food programs at discounters.



In food, candy and snacks, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the North Central States—6%. *Source:* DSN/*Leo J. Shapiro & Associates*



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TOYS/TOP BRANDS

Many Suppliers Attract Strong Followings

Intense consumer demand for video games and major market inroads by toy supermarket chains have changed the complexion of discounter toy departments.

Narrower assortments and lower inventory investments have created smaller departments—but the new emphasis on productivity has allowed a long list of suppliers, leaders in a wide variety of classifications, to establish strong followings.

Fisher Price, maker of preschool and educational toys, ranked first in *DSN*'s national survey of discount store managers.

That top-place standing held among conventional and upscale discounters as well.

Mattel, Playskool, Kenner and Milton Bradley ranked second, third, fourth and fifth, respectively on the national survey—but conventional and upscale unit managers meted out some different rankings.

Upscale store managers ranked Playskool second with 68% of the managers polled favoring the brand as compared to 54% of the conventional store unit managers. Playskool was ranked third by the later group as in the national sampling.

Mattel ranked third among upscalers and second among conventional store managers.

Fourth- and fifth-place rankings were held by Kenner and Milton Bradley, respectively, in all groups.

Fisher Price's first-place ranking continued among the top four chains, as well.

The greatest number of K mart, Wal-Mart, Zayre and Target managers named the preschool toy maker first among toy suppliers. Target managers were most enthusiastic about Fisher Price, with 87% of the Target managers citing the manufacturer as the top brand as compared to 67% of the K mart managers.

K mart, Zayre and Target all ranked Playskool second, while Wal-Mart gave second place to Mattel.

Further down the list, Tonka, Huffy and Tomy got higher marks from upscale discounters than from their conventional store counterparts.

There were also regional differences.

No store managers in the West, for example, reported any brand label growth in their toy departments in the last year. Managers in the three other regions reported only minimal brand name stock additions.

Otherwise regional tastes paralleled national preferences, but varied by degree.

Toys

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Fisher Price	71%	67%	87%
Mattel	62	63	61
Playskool	56	54	68
Kenner	44	46	33
Milton Bradley	26	29	13
Tonka	20	18	27
Parker Brothers	20	22	8
Huffy	14	13	20
Tomy	11	10	17

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Fisher Price	67%	74%	84%	86%
Mattel	51	69	42	61
Playskool	60	63	67	63
Kenner	41	29	52	21
Milton Bradley	38	23	29	11
Tonka	19	8	19	34
Parker Brothers	19	23	28	—
Huffy	12	12	24	17
Tomy	8	3	7	18

Source: DSN/*Leo J. Shapiro & Associates*

KITCHEN & LAUNDRY SUPPLIES/TOP BRANDS

Oft-Promoted, Big-Sale Items Entrenched

Even with some chains paring back the space given to kitchen and laundry cleaning supplies to make room for higher-margin housewares, the top brands list indicates that the often-promoted, big-volume-branded merchandise remains firmly entrenched in stocks.

To designate the top five brands list in the category eight brands were named, since store managers give tie scores for second, fourth and fifth places.

The leader in the category was Tide, mentioned by 39% of all store managers. Comet and Clorox, named by 21% of the managers, got the second spot. Ajax, mentioned by 18%, was in third place. Rubbermaid and Cheer, with 16% mentions, was fourth. Procter & Gamble and Fab came in fifth with 15% mentions. Not far behind these brands was Windex, named by 13% as a best seller.

In comparing the separate listing of conventional vs. upscale chain managers, Tide turned in a stronger performance with the upscalers, named by 58%, compared to 35% of the conventionals.

Other brands which received a heavier vote from the upscalers were Clorox, 31% compared to 19%; Rubbermaid, 25% compared to 14%, and Windex, 26% compared to 10%.

When individual chain managers listed their top brands, the response from K mart was Fab, mentioned by 28% of its managers. A total of 57% of Wal-Mart's managers named Tide. At Zayre the leader was Clorox.

A whopping 62% of Target's managers named Tide as their top brand, like the managers at Wal-Mart did. At Target, that 62% mentioned totally overwhelmed the closest competitor in its top brand lineup, Clorox, mentioned by 31%.

The competition was closer at Wal-Mart. Tide had 57% mentions, but Procter & Gamble was just behind.

Although Windex didn't make the top five list for all discounters or the conventional chains, this brand did place third on the list of the upscale chains.

On the individual chain listing, Windex was fourth at K mart, named by 20% of its managers. The brand was also fourth at Target, mentioned as a best seller by 24%.

Store brand/PL merchandise, according to store managers, has had very little impact on this category. Only 1% of all store managers and 1% of the managers at conventional chains named the store's own brand as a best seller.

With chains cutting back shelf space for kitchen and laundry supplies, it was predictable that store managers wouldn't mention this category as one with an increase in the number of brands stocked last year.

Kitchen And Laundry Supplies

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Tide	39%	35%	58%
Comet	21	21	22
Clorox	21	19	31
Ajax	18	20	11
Rubbermaid	16	14	25
Cheer	16	16	14
Procter & Gamble	15	15	15
Fab	15	16	11
Windex	13	10	26
Store brand/PL	1	1	—

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Tide	18%	57%	5%	62%
Comet	23	20	23	27
Clorox	13	14	30	31
Ajax	26	11	19	9
Rubbermaid	16	11	20	18
Cheer	3	37	7	9
Procter & Gamble	6	54	20	18
Fab	28	6	4	5
Windex	20	3	7	24
Store brand/PL	2	—	—	—

Source: DSN/*Leo J. Shapiro & Associates*

Stanley, Black & Decker Far in the Lead

Hardware

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Stanley	82%	80%	63%
Black & Decker	81	82	77
Lucite	9	11	2
Glidden	8	3	33
General Electric	6	5	12
Hirsh	6	2	26
Olympic Paint	6	5	12
Du Pont	6	7	—
Skil	5	5	4
Great Neck	5	5	2
Genie	4	2	16
Store brand/PL	4	4	2

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Stanley	91%	86%	78%	54%
Black & Decker	93	86	84	71
Lucite	—	23	39	—
Glidden	5	—	—	41
General Electric	—	29	—	15
Hirsh	—	3	4	31
Olympic Paint	—	23	22	15
DuPont	—	6	21	—
Skil	—	—	—	5
Great Neck	5	—	17	3
Genie	—	3	13	20
Store brand/PL	8	—	5	3

Source: DSN/*Leo J. Shapiro & Associates*

Hardware is unequivocally a two-horse race between Stanley and Black & Decker which were cited as top brands by more than 8 out of 10 store managers nationwide.

Lucite came in a relatively weak third with its 9% overall incidence of mention.

Although the top two brands dwarfed the rest of the department, Black & Decker appeared to have more consistent support in stores of all formats; it was cited 82% of the time at traditional stores and 77% by upscalers. Stanley, on the other hand, was considerably stronger among managers of conventional units, at 86%, than at upscale chains, 63%.

Even Lucite's standing emanated largely from its strength at conventional stores—11%, compared with a 2% level of mention among upscalers.

To a lesser extent, the same was true for Great Neck, the 10th leading brand, which was cited 5% of the time by conventional store managers, and 2% at upscalers.

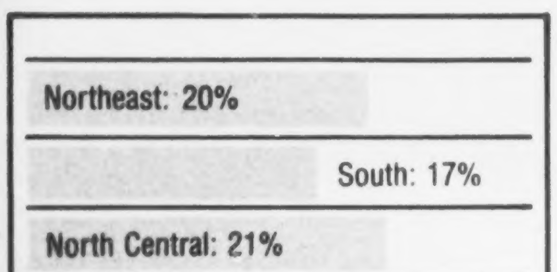
That's not the way it happened, however, for brands four through seven, which garnered their greatest support among managers at upscale stores. The differences were substantial too.

Glidden, for instance, was 11 times more potent at upscalers than conventional stores; General Electric was twice as strong; Hirsh 13 times as strong, and Olympic Paint double.

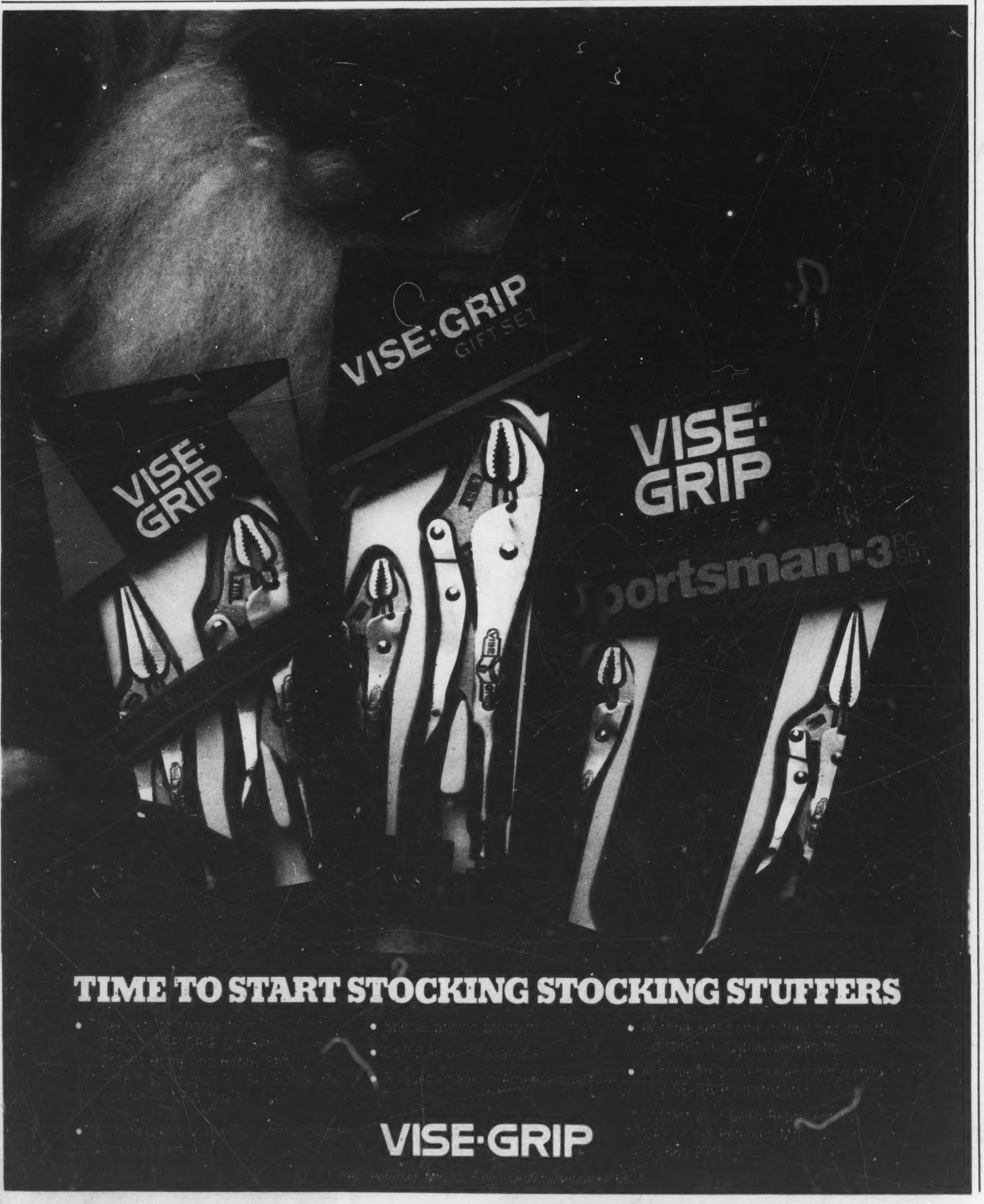
Genie, the 11th brand on the list, also was mentioned as a top brand eight times more often at upscalers.

When store managers at four leading chains were asked to name their best-selling brands, Black & Decker wound up as the unanimous No. 1 brand. It edged Stanley by whiskers at K mart, Wal-Mart and Zayre, and by roughly one third at Target. Apparently, it was the entire universe of store managers polled that perched Stanley on top overall.

(Continued on page 59)



In hardware, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the North Central States—21%. *Source:* DSN/*Leo J. Shapiro & Associates*

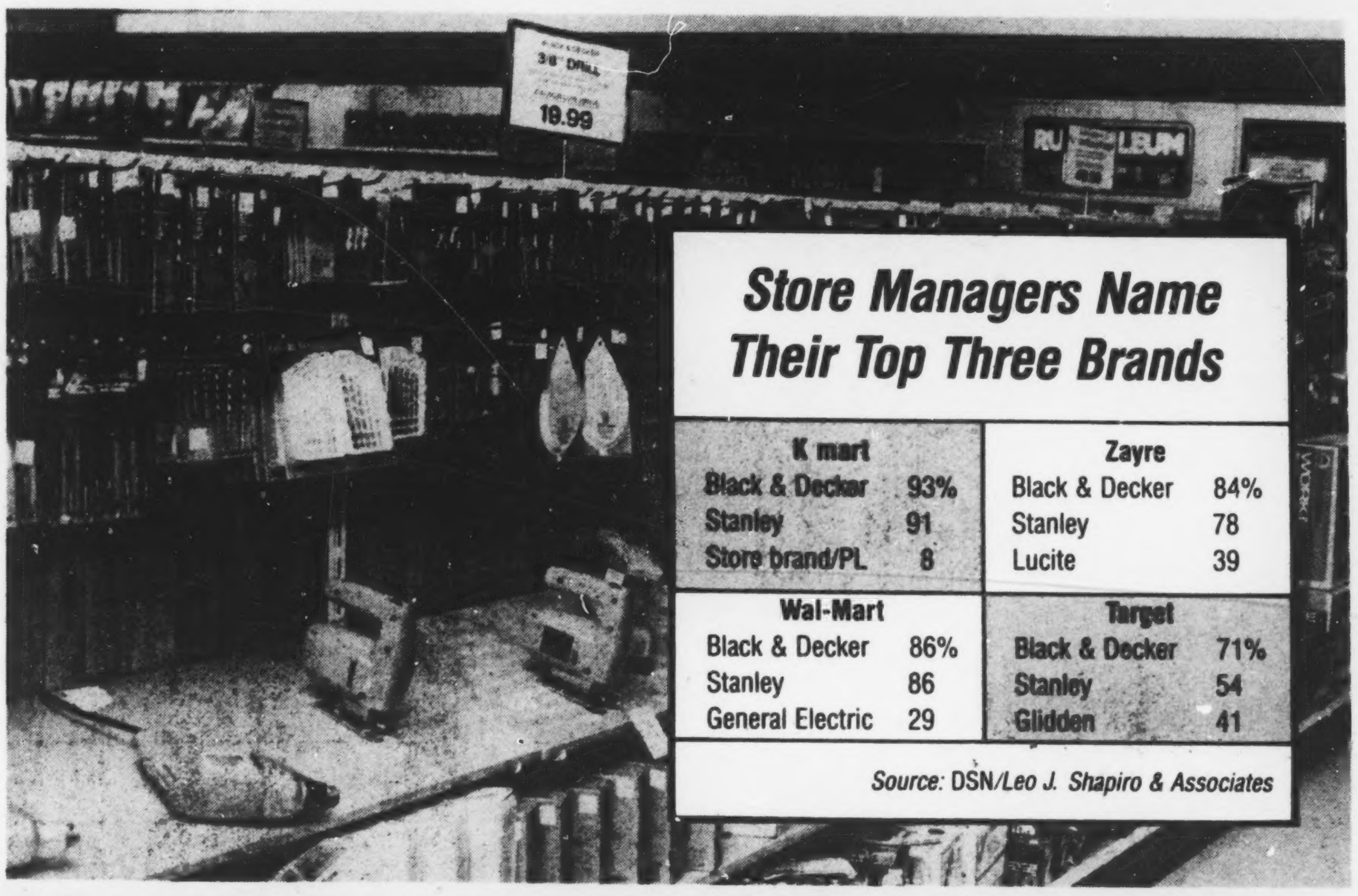


Hardware

Top Brands Differ by Region

Brands	Northeast	South	North Central	West
Stanley	94%	80%	75%	84%
Black & Decker	82	79	83	81
Lucite	13	16	6	1
Glidden	2	5	16	4
General Electric	2	8	8	4
Hirsh	5	4	11	3
Olympic Paint	4	11	5	2
Du Pont	15	7	1	2
Skil	—	6	5	9
Great Neck	8	6	2	3
Genie	1	5	6	3
Store brand/PL	3	2	4	7

Source: DSN/Leo J. Shapiro & Associates



Store Managers Name Their Top Three Brands

K mart		Zayre	
Black & Decker	93%	Black & Decker	84%
Stanley	91	Stanley	78
Store brand/PL	8	Lucite	39
Wal-Mart		**Target**	
Black & Decker	86%	Black & Decker	71%
Stanley	86	Stanley	54
General Electric	29	Glidden	41

Source: DSN/Leo J. Shapiro & Associates

Hardware

(Continued from page 58)

Among leading hardware brands, many received either no mentions among these four chains or else aren't sold at all of them. For instance, Stanley and Black & Decker attained strong levels of mention at K mart, Wal-Mart, Zayre and Target. But beyond these two labels not a single other brand was cited by all four.

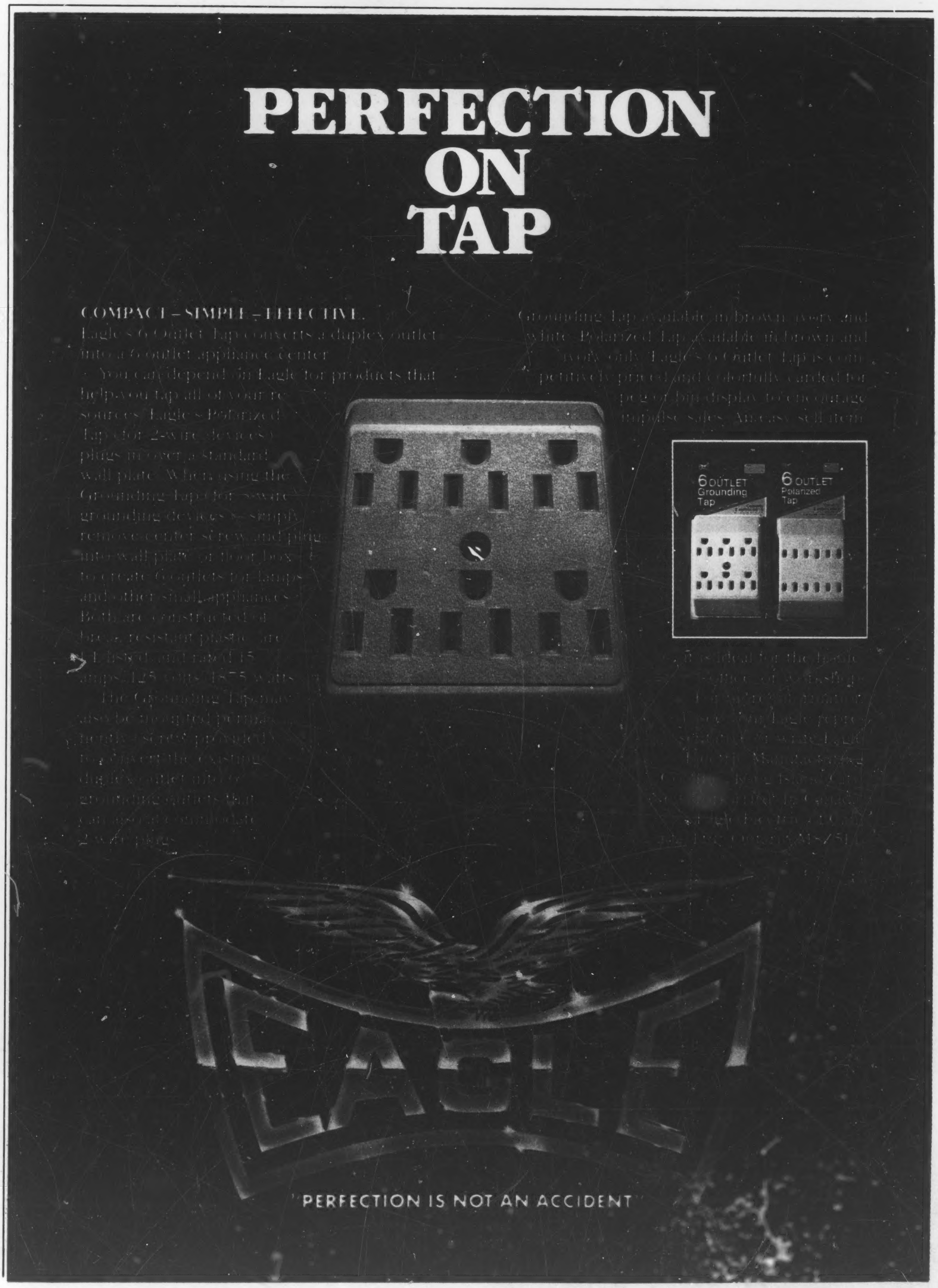
As an example, Lucite scored well at Zayre and Wal-Mart, but not at all at K mart and Target; Glidden fare best at Target, but received no mentions from managers at either Wal-Mart or Zayre . . . and so on down the list.

Among the top three sellers at each of these four chains, the third-cited brand consistently had much less support than either Stanley or Black & Decker. And, the third brand was different at each.

At Wal-Mart, General Electric snared third place with a 29% level of mentions; at Zayre, Lucite's 39 % did the trick, and at Target, Glidden scored 41%.

Notably, K mart's third best-selling hardware brand was its private label, at 8%. All in all, K mart mentions were virtually all in the pocket of Stanley and Black & Decker. But even at Zayre, where nine of the the top 12 brands received mentions in a more widespread representation, private label fared respectably. It was rated eighth, at 5%.

Notably, discounters appeared more willing to add new hardware brands in 1983 than in most other categories. A considerable 21% of store managers in the North Central region reported carrying more hardware brands this year, and an equally impressive 20% said the same in the Northeast. The falloff is only slight elsewhere in the country, with 17% of managers in the South saying their chains added to the brand assortment, and 14% in the West.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LADIES' APPAREL/TOP BRANDS

Name Brands Increase in Many Stores

Ladies' Apparel

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Lee	41%	37%	61%
Wrangler	34	31	48
Calvin Klein	26	18	69
Levi's	22	15	58
Sasson	18	20	9
Chic	18	17	19
Jordache	16	19	2
Playtex	10	11	7
Store brand/PL	7	8	—

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Lee	20%	23%	47%	61%
Wrangler	25	81	15	53
Calvin Klein	28	—	4	79
Levi's	12	6	14	66
Sasson	38	—	14	6
Chic	5	—	39	18
Jordache	29	3	4	3
Playtex	2	6	10	6
Store brand/PL	7	22	20	—

Source: DSN/*Leo J. Shapiro & Associates*

Ladies' apparel and men's apparel have a lot in common, judging by the store manager survey.

For one, both their lists of top brands were overwhelmed by jeans-oriented suppliers. When a resource, other than a jeans maker, turned up as a best-seller it was a backbone resource for a basic category. In ladies' apparel, Playtex made the listing of top sources; the men's wear counterparts were Fruit of the Loom and Hanes.

And, when store managers were asked to name departments in which the number of national brands increased during the past year, women's apparel was the department mentioned most often: by 26% of all store managers; 25% of the managers at conventional chains, and by 31% of the managers at upscale chains.

Men's apparel was the runner-up in this query.

Between the number of chains honing in on versions of a brands-for-less program; the availability of branded goods from diverters last year, with and without the manufacturers' blessing; the growing list of branded suppliers looking for discounter business on a direct basis, it wasn't surprising that store managers pointed to the apparel departments as those showing the most brand name growth.

The top brand lineup in ladies' apparel—Lee, Wrangler, Calvin Klein, Levi's, Sasson, Chic and Jordache—is evidence that discounters did, in fact, get the brands on the selling floor by using a combination of the above buying approaches.

Lee and Wrangler were named as the top brands by all store managers. But, an interesting variation showed up between the conventional and the upscale chain store manager response.

Upscale chain store managers gave their heaviest number of mentions to just four brands, all jeans makers: Calvin Klein, 69%; Lee, 61%; Levi's, 58%; and Wrangler, 48%.

The picture from the conventionals was different. Here, store managers' response wasn't heavily concentrated on four brands. There was a more even spread of votes for several jeans brands. The heaviest number of mentions was for Lee with 37%.

At Wal-Mart and Zayre first and second place went to jeans suppliers, but their respective managers gave the third spot to store brand/private label merchandise.

At Wal-Mart 22% named PL merchandise, putting the store's brands just behind Lee, mentioned by 23%.

CHILDREN'S APPAREL/TOP BRANDS

No Top Brand Shows Real Dominance

Children's Apparel

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Garanimals	21%	22%	19%
Lee	21	16	44
Wrangler	17	15	27
Curity	15	16	15
Garan	10	9	18
Spencer's	10	11	4
Pampers	9	9	6
Levi's	8	6	17
Store brand/PL	11	12	5

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Garanimals	—	31%	9%	18%
Lee	—	—	4	51
Wrangler	4%	34	7	27
Curity	14	12	7	15
Garan	—	36	—	8
Spencer's	15	6	19	5
Pampers	13	9	15	8
Levi's	5	—	—	20
Store brand/PL	14	27	5	3

Source: DSN/*Leo J. Shapiro & Associates*

The top brand survey for children's apparel turned up some results that distinguish this area from the other 15 categories examined.

In all other merchandise categories, the top brand, and often the second place brand, were mentioned as best sellers by anywhere from 35% all the way up to 93% of the store managers polled. In other words, there were clear leaders among the top suppliers.

Children's wear was different. Here, the top suppliers in the area are in a real horse race. None of the top brands were mentioned often enough to come up with a score that showed them as dominating the children's wear business. The leaders—Garanimals and Lee—were mentioned by 21% of the store managers.

In the category there was a tie for the top spot and another tie for fifth place. Consequently, it took naming seven brands to come up with the top five in children's apparel.

Garanimals and Lee were tied for first place. The second and third ranking brands were Wrangler and Curity, with 17% and 15%.

Store brand private label merchandise ranked high in children's wear. With 11% of the store managers naming it as a best seller, store brand merchandise took the fourth top brand spot.

The number of discount chains with a fully developed private label layette business and the price sensitivity of the entire children's wear area—leading to heavy doses of store brand, Far East imports—probably accounts for the private label strength in the category.

In fifth place there was a tie between Garan and Spencer's, each mentioned by 10% of all store managers.

Very close to these top brands were the scores for Pampers, 9%, and Levi's, 8%.

This close rating among the top brands changed only when viewed from the perspective of the upscale chains.

For instance, the upscale manager named Lee, 44%, as their top brand; just 16% of the store managers at conventional chains named Lee. Wrangler took second place, mentioned by 27%, among the upscalers; 15% of the managers of conventional chains named Wrangler.

Another difference between the conventional and upscale store manager response was the view of store brand/PL goods. Of the managers at conventional chains, 12% mentioned PL as a best seller compared to just 5% at the upscale chains.

Kodak, Polaroid Are Runaway Winners

Kodak and Polaroid were runaway best sellers in discount photo departments.

Regardless of store format or area of the country, no other brands encroached upon their tandem lead at major discount chains, said store managers. Despite their frontrunning, however, Japanese brands still carry significant sales impact.

Canon, Minolta, Nikon, Fuji and Yashica have all made inroads of varying degrees, with upscale chains perceiving strong performances from several.

For instance, 73% of upscale discounters named Canon as a best seller, slightly more than double its incidence of mention at conventional stores. While Minolta received consistent levels of mention in all format stores, Nikon fared 12 times better among upscale store managers than conventional discounters.

Although Canon attained the third-highest level of store manager mentions as a top brand, Minolta's levels of mention were fairly close. These brands, along with Kodak, Polaroid and Nikon, shared the top three rankings among both key conventional and upscale chains.

Coincidentally, more than 75% of store managers polled who mentioned the top two photo brands most frequently also predicted overall store sales gains of more than 10% for 1983. In addition, these managers also reported an increase in the number of national brands carried in the photo department this year. However, just one third of the chains predicting a 10%-plus rate of growth this year cited the next two brands, Canon and Minolta, as best sellers. As for Nikon, Fuji, Yashica and Olympus, they received best seller mentions from just 9% of managers predicting that sales growth rate for their stores.

Brand performance also varied among the top chains.

Target managers were considerably less keen on Kodak and Polaroid than were managers at K mart, Wal-Mart and Zayre. How-

(Continued on page 66)

Photo

Top Brands Vary by Type of Outlet

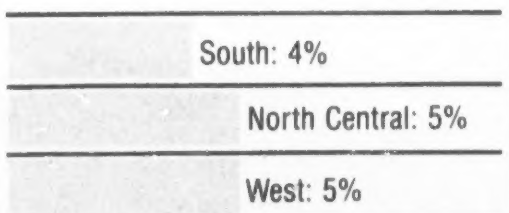
Brands	All Discounters	Conventional Discounters	Upscale Discounters
Kodak	93%	97%	74%
Polaroid	75	77	62
Canon	40	33	73
Minolta	27	27	27
Nikon	12	4	50
Fuji	9	9	4
Yashica	8	9	4
Store brand/PL	1	1	2

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Kodak	97%	97%	96%	71%
Polaroid	76	83	93	56
Canon	50	61	9	71
Minolta	47	61	—	18
Nikon	5	—	—	59
Fuji	—	28	—	—
Yashica	16	9	—	5
Store brand/PL	1	—	4	3

Source: DSN/*Leo J. Shapiro & Associates*



In photo, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the West and North Central States—5%. *Source:* DSN/*Leo J. Shapiro & Associates*

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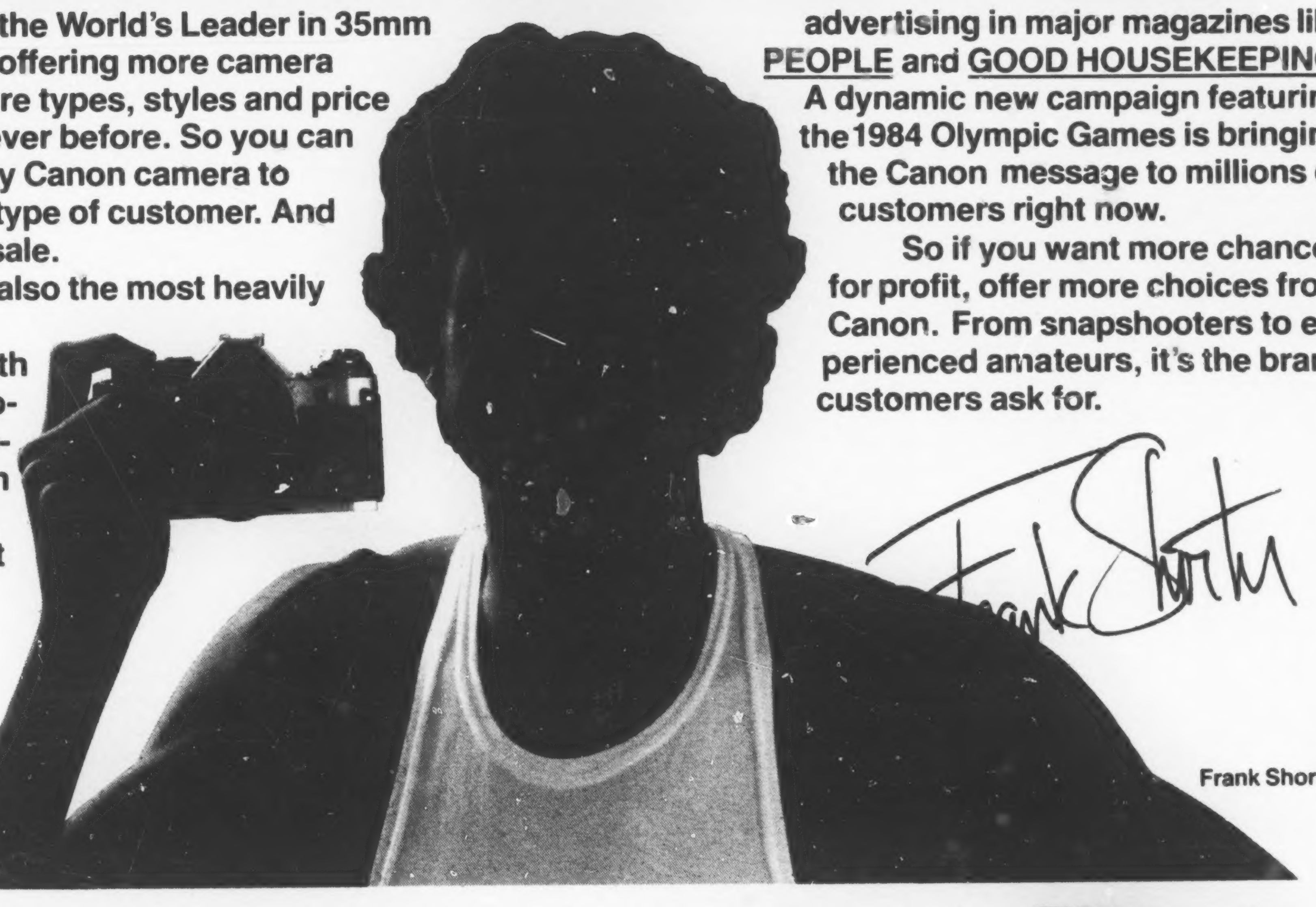
Canon is the World's Leader in 35mm Photography, offering more camera models, in more types, styles and price ranges, than ever before. So you can match a quality Canon camera to almost every type of customer. And never miss a sale.

Canon is also the most heavily advertised 35mm line, with constant exposure on prime-time television and full-page, full-color print advertising in major magazines like PEOPLE and GOOD HOUSEKEEPING. A dynamic new campaign featuring the 1984 Olympic Games is bringing the Canon message to millions of customers right now.

So if you want more chances for profit, offer more choices from Canon. From snapshooters to experienced amateurs, it's the brand customers ask for.



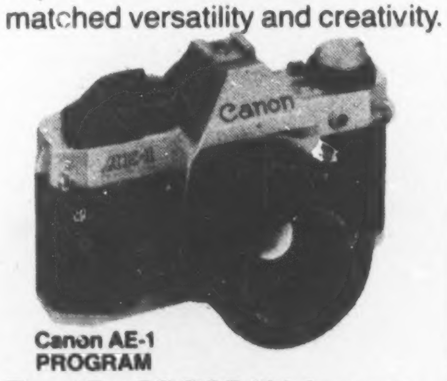
Frank Shorter

Frank Shorter

The Canon "A" Series SLR cameras combine quality 35mm photography with the convenience of automatic operation.

Canon A-1

The Canon A-1 is our most sophisticated model, featuring six exposure control modes for unmatched versatility and creativity.



Canon AE-1 PROGRAM

The AE-1 PROGRAM features programmed automation for focus-and-shoot simplicity, plus shutter-priority automation for creative control. The world-famous Canon AE-1 features shutter-priority automation, and

Canon AL-1 QUICK-FOCUS

the AL-1 offers the QUICK-FOCUS system which makes it easy for anyone to get sharp pictures every time.

Canon T50

The Canon T50 is so automatic it even loads itself, and features programmed automation and a built-in power winder at an unbelievably low price! And all Canon SLR cameras can use the full line of over fifty Canon FD wide-angle, telephoto, zoom and macro lenses, plus Canon accessories and Speedlites that add up to additional sales for you.

Canon Sure Shot cameras provide total automation for perfect pictures any time, any

Canon New Sure Shot

place. The New Sure Shot loads itself, and features auto winding, rewinding, auto exposure control, automatic focus and built-in flash. The Super Sure Shot has all these features plus a fast, f1.9 Canon lens.

Canon Snappy 20

Canon Snappy 50

The Canon Snappy cameras are a snap to use but take high quality pictures on 35mm film—like all Canon cameras. With the ease of one-button operation, Snappy loads itself, winds the film after each shot—rewinds it when the roll is finished, sets exposure and has a built-in flash! The Snappy 20 comes in five terrific colors with an f4.5 fixed-focus lens. The Snappy 50 comes in charcoal gray and features an f3.5 autofocus lens. Both come complete with self-display packaging and are priced for high turnover.

The Official 35mm Camera of the 1984 Olympic Games

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123 Paularino Avenue East, Costa Mesa, California 92626 / 2035 Royal Lane, Suite 290, Dallas, Texas 75229 / Bldg. B-2, 1050 Ala Moana Blvd., Honolulu, Hawaii 96814 / Canon Canada, Inc., Ontario
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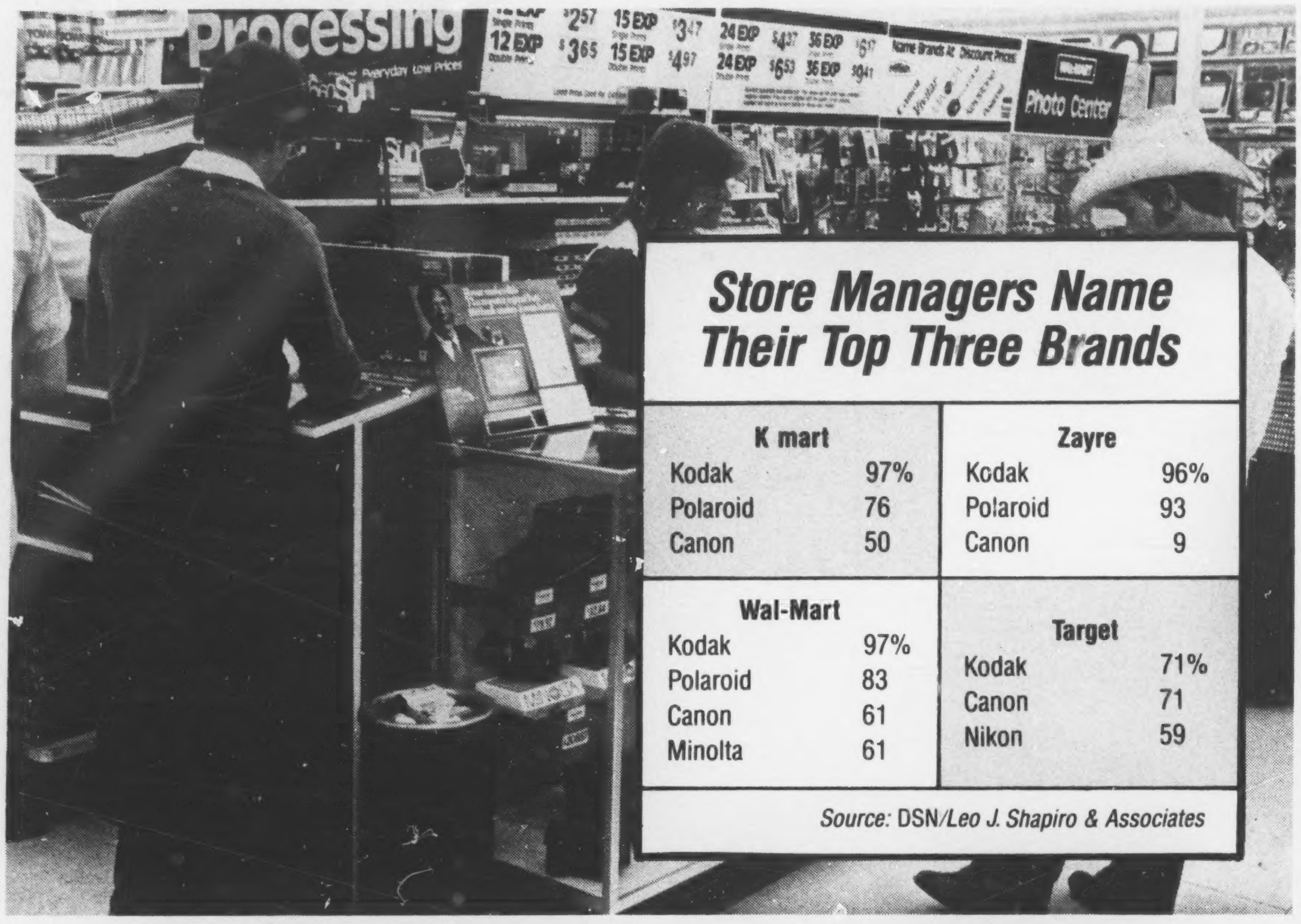
Photo

Top Brands Differ by Region

Brands	Northeast	South	North Central	West
Kodak	97%	93%	93%	91%
Polaroid	76	82	74	66
Canon	30	38	41	50
Minolta	18	24	22	47
Nikon	4	9	19	12
Fuji	5	8	13	5
Yashica	8	5	13	4
Olympus	7	6	8	4
Store brand/PL	1	1	1	—

Source: DSN/*Leo J. Shapiro & Associates*



Store Managers Name Their Top Three Brands

K mart	
Kodak	97%
Polaroid	76
Canon	50

Zayre	
Kodak	96%
Polaroid	93
Canon	9

Wal-Mart	
Kodak	97%
Polaroid	83
Canon	61
Minolta	61

Target	
Kodak	71%
Canon	71
Nikon	59

Source: DSN/*Leo J. Shapiro & Associates*

Photo

(Continued from page 65)

ever, Zayre's managers believed their photo sales to be largely concentrated in those two brands.

Minolta found its highest levels of mention at K mart and Wal-Mart, but got less levels of recognition elsewhere. Canon and Nikon got their strongest notices at Target, and Fuji at Wal-Mart.

For now, store brands and private labels are making little impact in the photo department, but PL film and film processing programs are being developed at many chains.

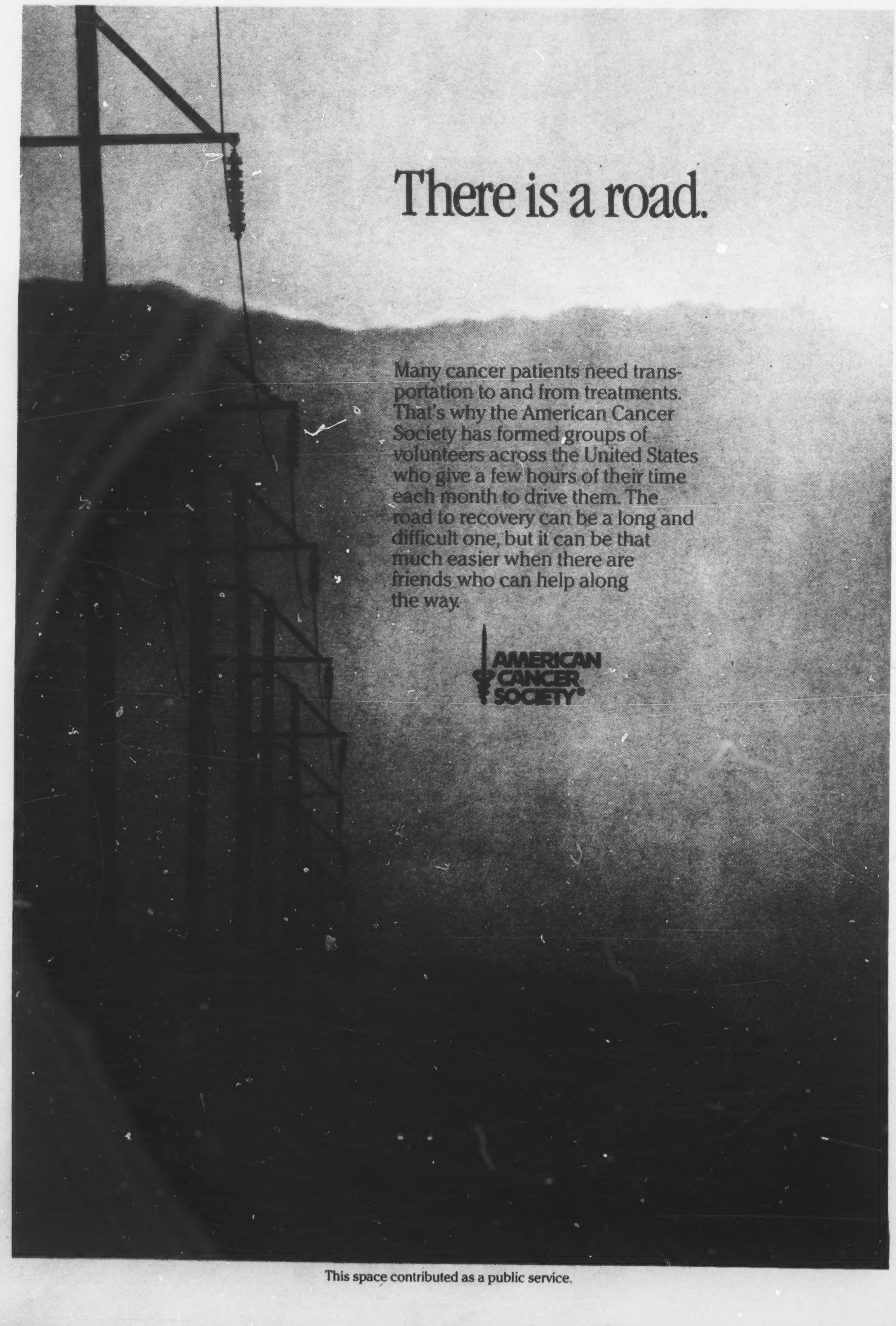
Notably, discount chains in most parts of the country are not shuttering their doors to the entry of new brands. Store managers in the North Central, West and South regions reported carrying more national brands this year than last, although Northeastern store managers reported no expansion in brand variety.

Adding It Up

Regional perceptions tend to parallel the national patterns, with the heaviest concentration among the top four sellers—Kodak, Polaroid, Canon and Minolta. For the most part, store managers say these brands dominate discount chain photo sales coast to coast. The exceptions are Canon, whose strength surged in the West, and Minolta, which did the same out West but got weaker grades in the Northeast.

For the most part, North Central store managers named more photo brands as best sellers than their counterparts elsewhere in the country. Conversely, managers in the West named significantly fewer photo brands as best sellers.

According to the managers polled, Canon and Minolta are the strongest performing Japanese brands.


There is a road.

Many cancer patients need transportation to and from treatments. That's why the American Cancer Society has formed groups of volunteers across the United States who give a few hours of their time each month to drive them. The road to recovery can be a long and difficult one, but it can be that much easier when there are friends who can help along the way.

AMERICAN CANCER SOCIETY®

This space contributed as a public service.

Atari Solidly Wins the No. 1 Spot

Consumer Electronics

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Atari	73%	75%	67%
Texas Instruments	40	42	29
Panasonic	36	30	66
Commodore	34	34	36
General Electric	28	27	28
Coleco	21	20	28
Soundesign	18	19	13
Intellivision	18	18	18
Emerson	15	14	18
Sanyo	10	7	24
RCA	10	12	—
Sharp	10	9	11

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Atari	70%	69%	87%	64%
Texas Instruments	63	52	40	28
Panasonic	23	83	11	76
Commodore	69	—	35	39
General Electric	30	49	2	26
Coleco	3	3	44	21
Soundesign	12	17	31	13
Intellivision	25	—	15	16
Emerson	1	32	47	13
Sanyo	2	9	4	29
RCA	17	25	—	—
Sharp	23	3	—	11

Source: DSN/*Leo J. Shapiro & Associates*

The diverse assortment of products represented on the consumer electronics top-brand list underscores the department's broad-based appeal.

Atari, mentioned by 73% of all store managers polled and solidly in CE's top spot, led four other computer, software and video game brands: Texas Instruments, Commodore, Coleco and Mattel Intellivision. TI was named the top brand by 40% of the store managers; Commodore, 34%; Coleco, 21%, and Intellivision 18%.

However, makers of radios, televisions, tape recorders and video cassette recorders also scored high.

Panasonic, for example, was named by 36% of store managers, ranking as the third-leading brand overall.

General Electric, fifth overall, scored closest to Panasonic with its multiple product segments named 28% of the time. Soundesign, at 18% and seventh overall, slightly edged Emerson's 15%. Sanyo, RCA and Sharp followed at 10%; all scored better than 13 other brands mentioned in the CE survey.

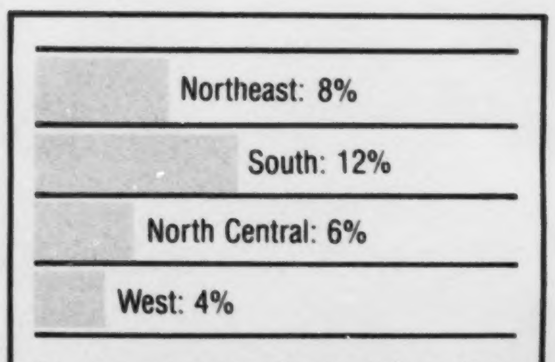
Significantly, the top five brands represented a vast array of product segments.

Although managers at conventional and upscale chains agreed on Atari as their respective top brand, they differed somewhat on mentions of the nine next most important brands. For instance, TI fared considerably better among conventional chains than at upscale discounters, as did Soundesign further down the list.

For several others, however, upscalers were the kindest. Panasonic was named twice as often, Coleco nearly one-and-a-half times as much and Sanyo more than triple the number of times at upscale chains, when compared with levels of mention at conventional counterparts.

TI and Panasonic are strong in different-format discount chains. Although TI edged Panasonic for the No. 2 spot overall, the latter brand was mentioned by upscale store managers more

(Continued on page 71)



In consumer electronics, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the South—12%. *Source:* DSN/ *Leo J. Shapiro & Associates*

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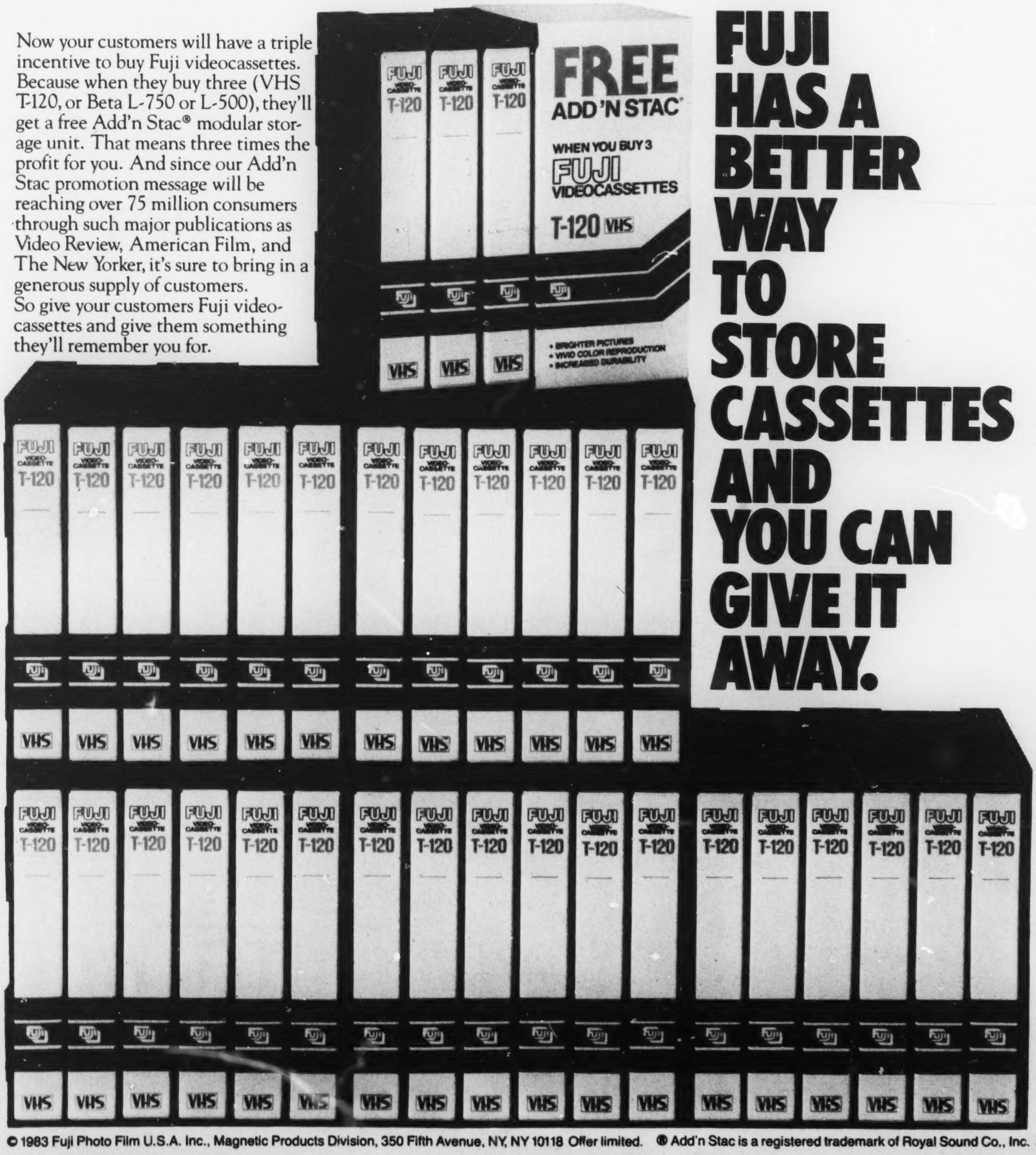
Now your customers will have a triple incentive to buy Fuji videocassettes. Because when they buy three (VHS T-120, or Beta L-750 or L-500), they'll get a free Add'n Stac® modular storage unit. That means three times the profit for you. And since our Add'n Stac promotion message will be reaching over 75 million consumers through such major publications as Video Review, American Film, and The New Yorker, it's sure to bring in a generous supply of customers.
So give your customers Fuji videocassettes and give them something they'll remember you for.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ADD 'N STAC
WHEN YOU BUY 3
FUJI
VIDEOCASSETTES
T-120 VHS
• BRIGHTER PICTURES
• VIVID COLOR REPRODUCTION
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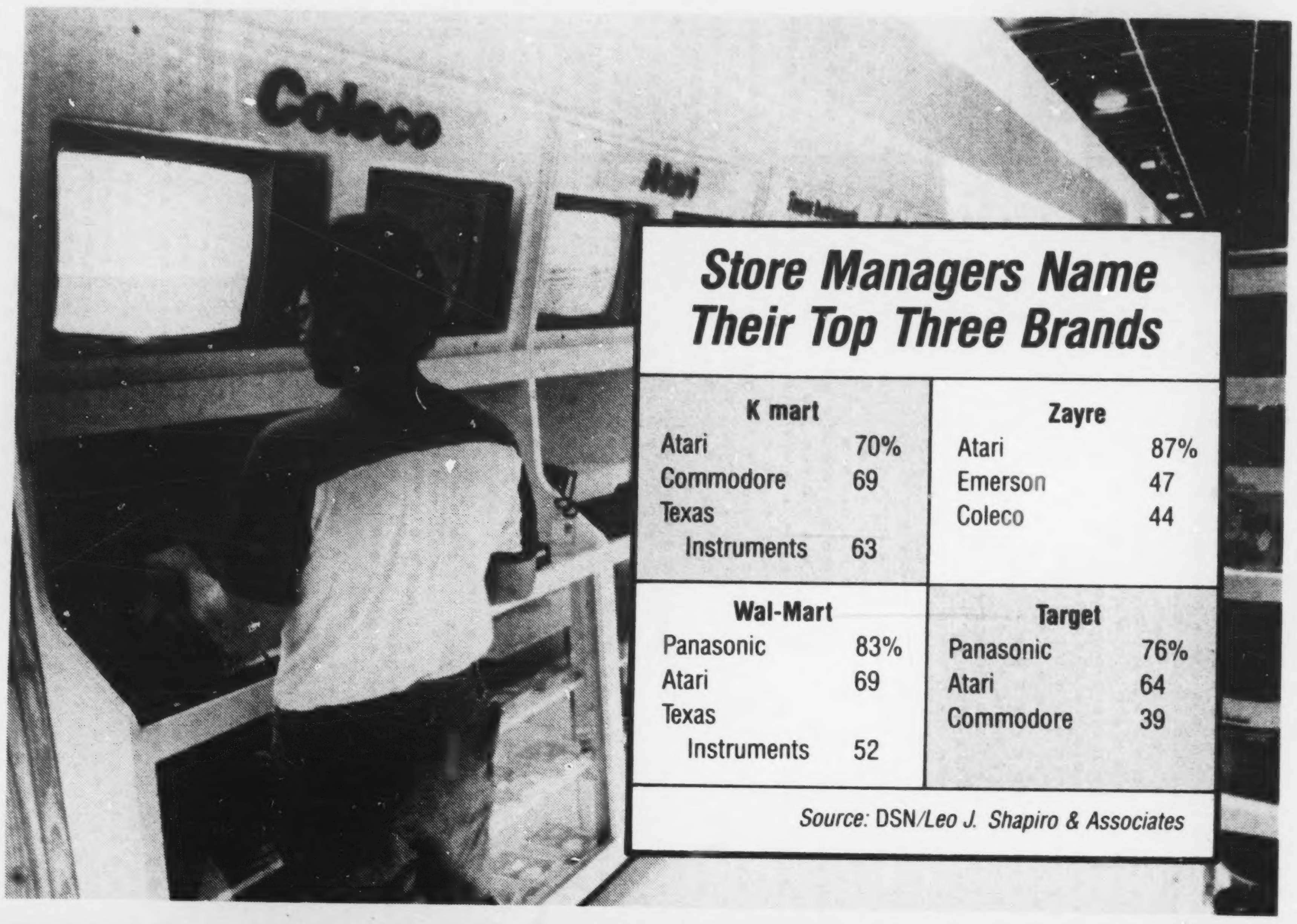
Consumer Electronics

Top Brands Differ by Region

Brands	Northeast	South	North Central	West
Atari	79%	75%	62%	83%
Texas Instruments	45	39	42	36
Panasonic	15	42	48	29
Commodore	34	27	34	45
General Electric	20	24	36	27
Coleco	42	14	13	27
Soundesign	14	30	14	9
Intellivision	19	17	13	24
Emerson	27	20	10	4
Sanyo	8	6	15	10
RCA	4	8	11	16
Sharp	6	4	11	18

Source: DSN/Leo J. Shapiro & Associates



Store Managers Name Their Top Three Brands

K mart		Zayre	
Atari	70%	Atari	87%
Commodore	69	Emerson	47
Texas Instruments	63	Coleco	44
Wal-Mart		**Target**	
Panasonic	83%	Panasonic	76%
Atari	69	Atari	64
Texas Instruments	52	Commodore	39

Source: DSN/Leo J. Shapiro & Associates

CE

(Continued from page 68)

than twice as often as TI. TI, however, topped Panasonic's levels of mentions in the broader base of conventional stores.

When store managers at four leading chains were asked to name their top three selling brands, only two, K mart and Zayre, placed Atari at the head of the list, albeit with considerable support—respective 70% and 87% incidences of mention.

On the other hand, Wal-Mart and Target managers put Panasonic in first place. Impressively, managers named it often—83% and 76% of the time.

Another Winner

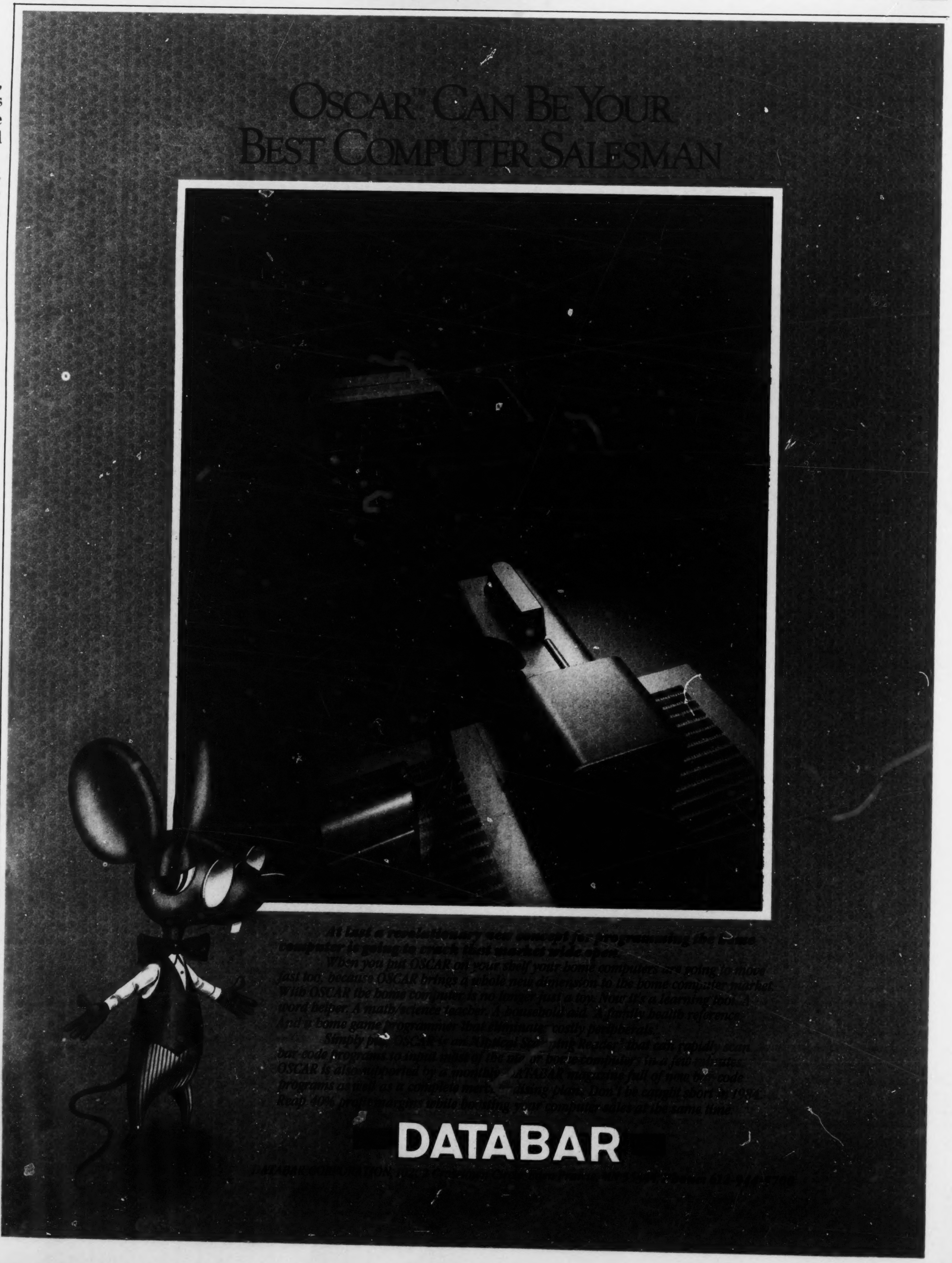
Commodore was among the top three brands at K mart and Target, and made a respectable 34% showing at Zayre too.

Although TI was considered a top-three brand at K mart and Wal-Mart, its levels of mention at Target and Zayre were considerably lower.

Similarly, Emerson and Coleco fared strongest at Zayre, but were mentioned as best sellers far fewer times at the other leading chains.

Perceptions of other top brands also differed by chain. For instance, General Electric and RCA received their highest levels of mention at Wal-Mart, Soundesign got its at Zayre, Intellivision and Sharp at K mart and Sanyo at Target.

Notably, discount chain store managers nationwide reported an increase in the number of CE brands carried this year. Southern retailers were apparently the most liberal, with a reported 12% adding brands. Keeping somewhat tighter reins on their assortments were Northeastern chains, at 8%, North Central at 6% and the West 4%.


OSCAR™ CAN BE YOUR BEST COMPUTER SALESMAN

At last a revolutionary new concept for programming the home computer is going to crack that market wide open.

When you put OSCAR on your shelf your home computers are going to move fast too, because OSCAR brings a whole new dimension to the home computer market. With OSCAR the home computer is no longer just a toy. Now it's a learning tool. A word helper. A math/science teacher. A household aid. A family health reference. And a home game programmer that eliminates costly peripherals.

Simply put, OSCAR is an Optical Scanning Reader that can rapidly scan bar code programs to input most of the major home computers in a few minutes. OSCAR is also supported by a monthly DATABAR magazine full of new bar code programs as well as a complete merchandising plan. Don't be caught short in 1984. Reap 40% profit margins while boosting your computer sales at the same time.

DATABAR

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Brand-Name Growth Widely Reflected

Store managers' responses for the housewares department reflected two concurrent trends in that area.

For one, they named traditional backbone suppliers—like Corning, Rubbermaid, Libbey and others—as the top brands in the department.

On the other hand, store managers also gave a very high score to the housewares department when asked: In which departments has the number of national name brands increased over the past year?

The housewares department was mentioned by 20% of all the managers polled. To put that number in perspective, housewares ranked third on the list of departments showing a growing list of brand names.

Only two departments, ladies' apparel, with mentions from 26%, and men's apparel, with 23%, came in ahead of housewares.

This addition of more name brands in housewares hasn't pushed the traditional leaders off of their perches. Nevertheless, several chains are looking to new sources to boost housewares margins, add more fashion-oriented merchandise and differentiate their assortments from those of the competition.

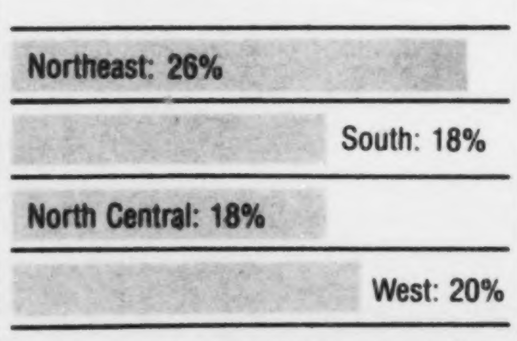
With those goals, it was predictable that managers of the upscale chains reported more of an increase in housewares brands than did managers of the conventional chains. Of the upscalers, 28% mentioned housewares, compared to 18% of the managers at conventional chains.

On the top brands listing itself, Corning came out in the leading spot among "all" discounters; two of this firm's lines—Pyrex and Corelle—tied for fourth position.

In the second spot was Rubbermaid. Two glassware suppliers rounded out the top five list: Libbey ranked in third place; Anchor Hocking was No. 5.

Close behind Anchor Hocking, mentioned as a best seller by 20% of the store managers, was Ekco, mentioned by 19%.

(Continued on page 73)



In housewares, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the Northeast—26%. *Source:* DSN/*Leo J. Shapiro & Associates*

Housewares

Top Brands Vary by Type of Outlet

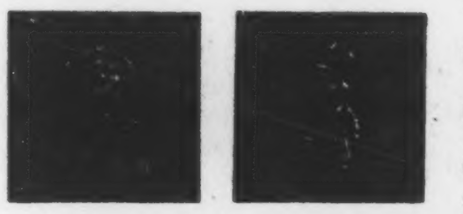
Brands	All Discounters	Conventional Discounters	Upscale Discounters
Corning	35%	38%	23%
Rubbermaid	32	32	32
Libbey	24	26	16
Pyrex	21	23	11
Corelle	21	21	18
Anchor Hocking	20	23	6
Ekco	19	19	21
Mirro	14	15	6
General Electric	13	10	27
Store brand/PL	1	1	—

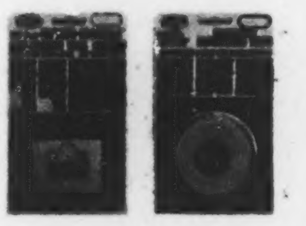
Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Corning	26%	66%	38%	22%
Rubbermaid	19	54	15	26
Libbey	21	34	35	16
Pyrex	12	25	27	8
Corelle	15	25	26	19
Anchor Hocking	17	32	39	5
Ekco	22	11	19	23
Mirro	7	32	5	5
General Electric	1	9	—	33
Store brand/PL	1	—	4	—

Source: DSN/*Leo J. Shapiro & Associates*





A Golden Anniversary Tale

ONCE upon a time there was a small corner gift shop in New Philadelphia, Ohio. One day the owners, Mr. and Mrs. Harry Miller, had the idea there might be a market in their shop for inexpensive, hand painted wall plaques. So Mrs. Miller, known to all her friends as Clela, gathered together some plaster, paints and lacquers, some flexible molding material and a few brushes and soon set to work producing her first small batch of wall plaques. When she had finished her plaques she placed them on conspicuous shelves in the little shop and waited anxiously for her customer's reactions.

Clela hadn't long to wait because her meticulously hand painted plaques all sold very quickly. Delighted with the results, she hurried back to her little worktable to make some more. As time passed the shop continued to prosper and soon the entire Miller family was involved in the design and manufacture of Miller Wall Plaques.

Today, 50 years later, Miller Studio celebrates its Golden Anniversary as a leading manufacturer of decorative housewares with world-wide distribution. In addition to designing and manufacturing original wall decor Miller Studio also produces an extensive line of household hangers, hooks and caddies. Known as MAGIC-MOUNTS®, this line was introduced in 1965 and consisted entirely of one item. Now the MAGIC-MOUNTS® line contains many kinds of helpful hangers and organizers for use throughout the home, office, garage and workshop.

Decorative, three-dimensional wall clocks were introduced in 1977 and currently available to the housewares trade is a wide selection of framed wall clocks in a variety of styles and designs. The latest development from Miller Studio is an exciting line of distinctive wall accents called FASHION-CRAFT$_{TM}$. Three dimensional designs are assembled in various combinations with grasscloth, burlap, cork, wicker, silk flowers and a variety of sturdy woodtone frames to create a collection of wall decor for today's design-conscious homemakers.

Over the years Miller Studio has initiated major expansion programs to meet the demands of an ever-growing market. Today the company has almost three acres of production and warehouse space under one roof, an investment that represents the company'seagerness to provide continuing service to all its customers.

MILLER STUDIO DIVISION

DIVISIONAL HEADQUARTERS
Miller Studio, P.O. Box 310
New Philadelphia, Ohio 44663
(216) 339-1100

WEST COAST DIST. CENTER
Miller Studio, P.O. Box 724
Santa Maria, California 93456
(805) 925-8118

MILLER PRODUCTS, INC.

CANADIAN DISTRIBUTOR
The Sapoline Co., Ltd., 700 E.C. Row North
Windsor, Ontario N8X 3J3
(519) 966-0872

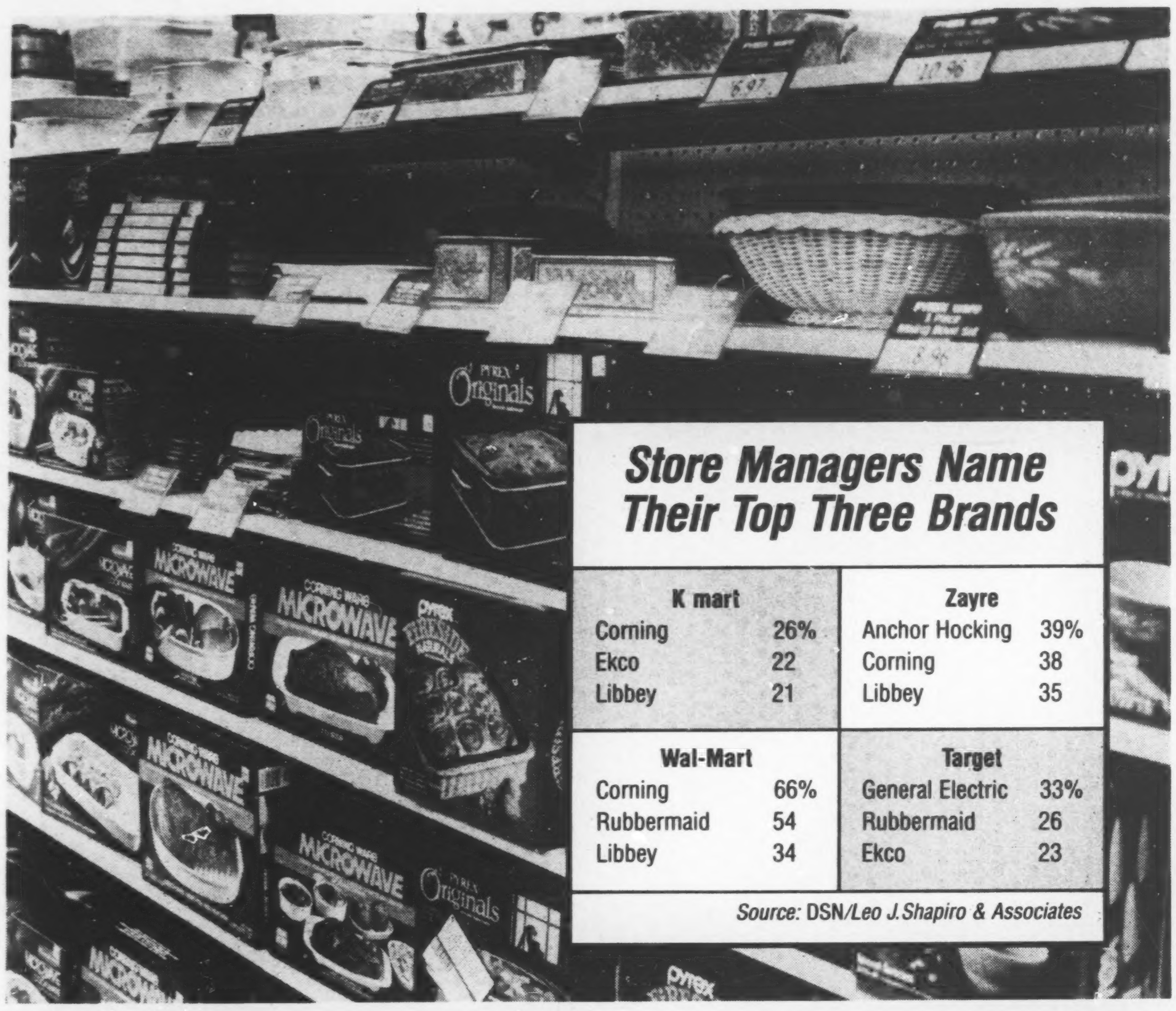
OVERSEAS SALES OFFICE
Harry Hyman & Son, Inc., 254 W. 54th St.
New York, New York 10019 • (212) 247-1726
RCA Telex: 237926 ITT Telex: 424191

Housewares

Top Brands Differ by Region

Brands	Northeast	South	North Central	West
Corning	32%	37%	27%	49%
Rubbermaid	29	31	28	40
Libbey	25	22	18	36
Pyrex	26	20	13	30
Corelle	32	15	24	14
Anchor Hocking	28	20	13	25
Ekco	20	22	19	14
Mirro	24	15	10	8
General Electric	12	14	15	10
Store brand/PL	1	1	—	—

Source: DSN/*Leo J. Shapiro & Associates*



Store Managers Name Their Top Three Brands

K mart		**Zayre**	
Corning	26%	Anchor Hocking	39%
Ekco	22	Corning	38
Libbey	21	Libbey	35
Wal-Mart		**Target**	
Corning	66%	General Electric	33%
Rubbermaid	54	Rubbermaid	26
Libbey	34	Ekco	23

Source: DSN/*Leo J.Shapiro & Associates*

Housewares

(Continued from page 72)

Responses from managers at the conventional chains left the two top brands intact—Corning in first place, Rubbermaid, second.

But, managers at the upscale chains turned in a different scenario. Their leading brand was Rubbermaid. In second place was General Electric. Corning, the leader among all discounters and the conventionals, ranked third.

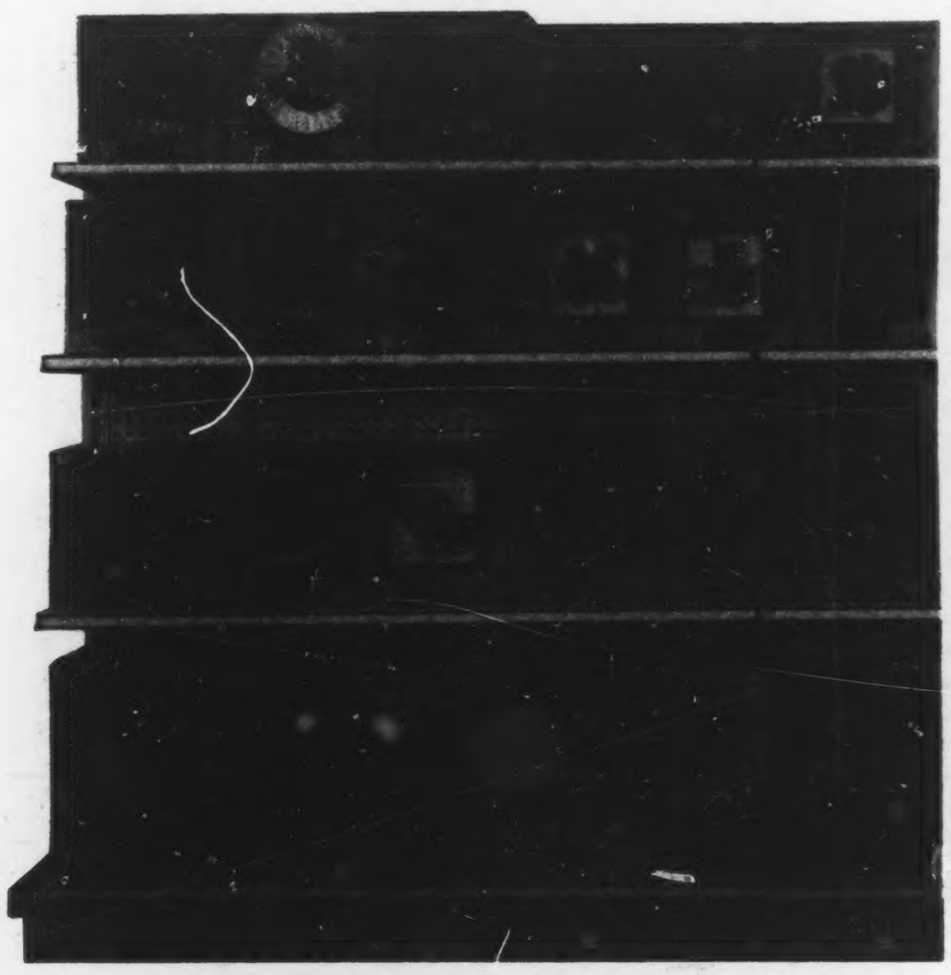
Ekco, which ranked sixth among "all" discounters and fifth among conventional chains, moved up a notch with the upscale store managers, placing fourth on their best seller list.

A few other notable differences in brand ranking turned up in the conventional vs. upscale tally. For example, Anchor Hocking ranked much higher with the conventional chains.

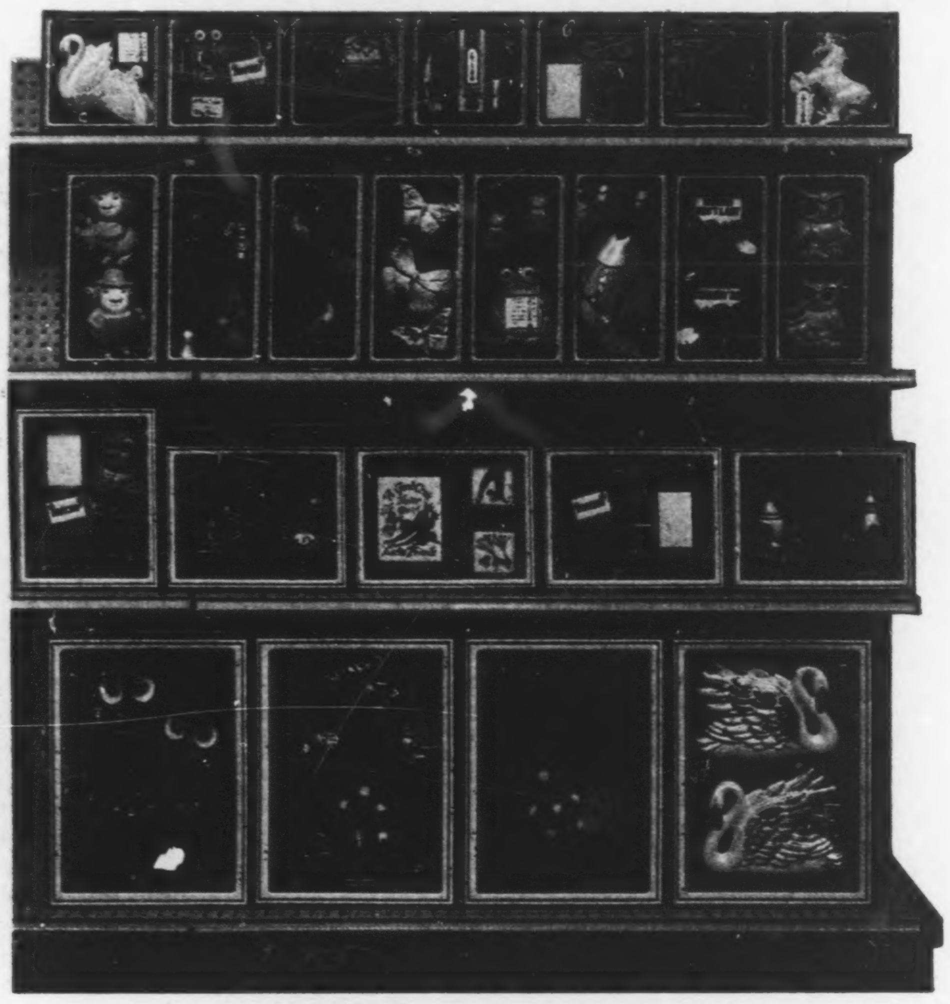
Similarly, Mirro was a high scorer with the conventionals, mentioned as a best seller by 15% of their managers. In contrast, just 6% of the upscale chain managers named this supplier.

Libbey, the third-ranking brand in the "all" discounter list, also fared better with the conventional store managers. Of them, 26% named Libbey as a best seller, compared to 16% of the upscalers.

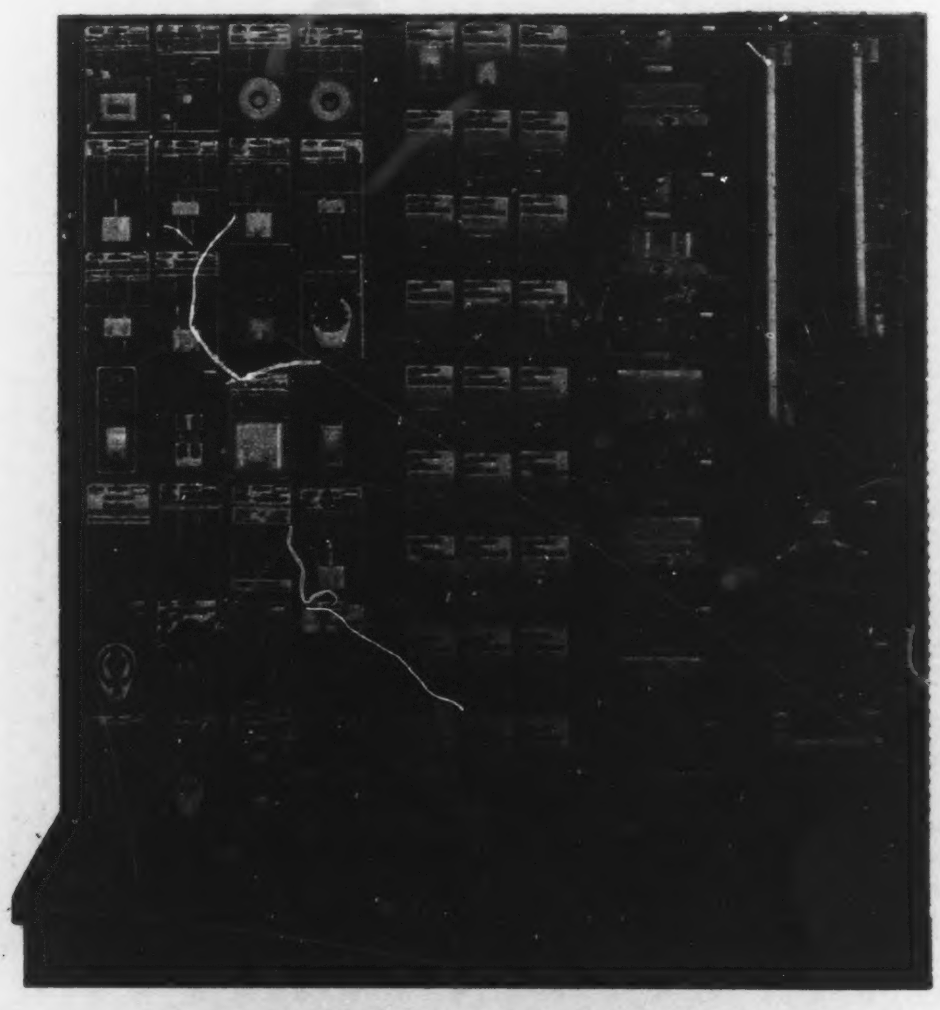
Store brand/private label had very few mentions as a best seller in housewares, understandable since the survey queried managers on performance in the past year. The low 1% mentioning the store brand as a best seller might turn up higher in subsequent surveys with more chains now beefing up giftware selections with store-brand items from the Orient.



Fashioncraft™
Distinctive Wall Accents



Wall Decor
Decorative & Utilitarian



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You can take advantage of our customized display service. We design planograms to fit your specific space requirements and provide you with a color print to show how the display will look in your store. Contact us today for all the details.

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RCA Telex: 237926 ITT Telex: 424191

Regional Growth Patterns Vary Markedly

Sporting Goods

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Wilson	60%	57%	73%
Coleman	58	58	58
Spalding	36	33	53
Igloo	22	24	9
Zebco	18	19	15
MacGregor	16	18	6
Remington	14	15	7
Shakespeare	11	9	26
Store brand/PL	1	1	—

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Wilson	37%	46%	60%	74%
Coleman	48	66	70	51
Spalding	15	28	38	57
Igloo	24	31	26	11
Zebco	11	41	17	18
MacGregor	50	3	2	1
Remington	10	31	—	9
Shakespeare	7	18	11	24
Store brand/PL	1	—	4	—

Source: DSN/*Leo J. Shapiro & Associates*

Varied regional growth patterns characterized the survey of top sporting goods brands.

Store managers in the South and West outdistanced their cold-weather-state siblings in reporting that sporting goods brand assortments had increased in the last year in their stores.

Seventeen per cent of the store managers polled in the South and 11% of those in the West reported brands were on the rise in their stores, compared to 1% of the managers surveyed in the Northeast and North Central states.

Apparently, outdoor equipment for fishing, hunting, boating and camping were an essential part of this growth. Fully, seven of the 11 top-selling brands mentioned most often by retailers nationwide are in the outdoor segment.

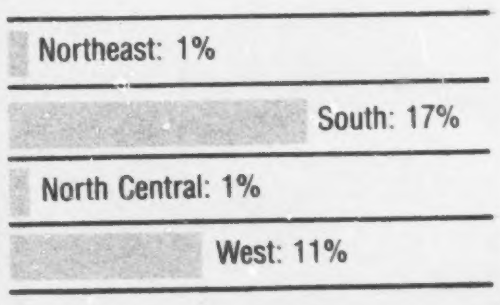
Coleman was named 58% of the time as a top brand, leading the outdoor segment in recognition. However, Igloo's 22% headed a bunched pack of Zebco, Remington, Shakespeare, Daiwa and Garcia brands.

Equipment brands used in competitive sports completed the top tier of best sellers. Among them, Wilson's 60% share of mentions was the highest attained by any brand.

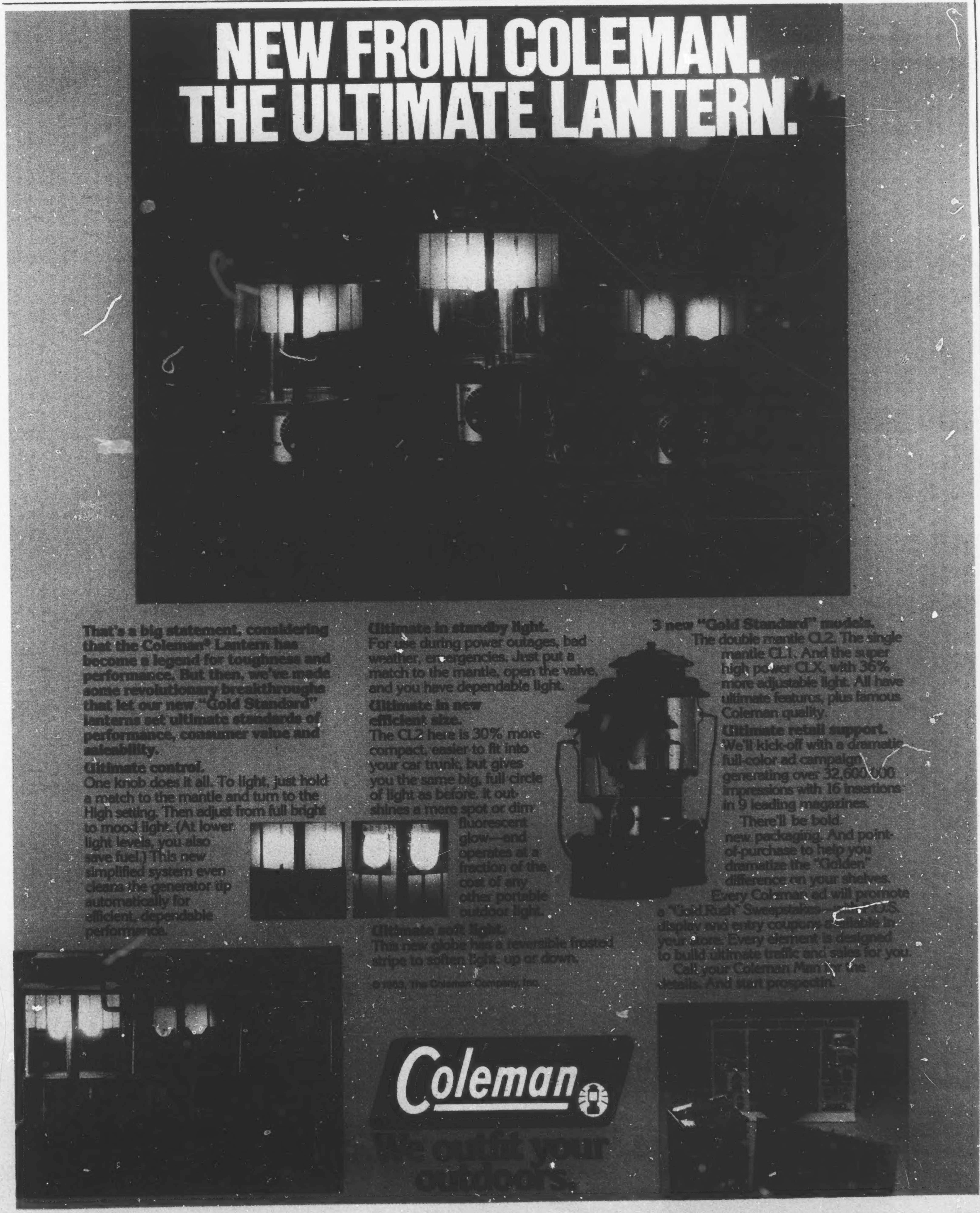
Managers at upscale chains cited Wilson considerably more often than their conventional counterparts; they named Spalding and Shakespeare as top brands more often, too.

When store managers at four leading chains were asked to name their three best-selling brands, Wilson and Coleman were cited consistently by all, while Spalding, Zebco and MacGregor were named less often.

Notably, Wilson's high top brand rating emanated largely from frequent mentions by Target and other upscale unit managers. At K mart, Wal-Mart and Zayre, the other leading chains which dominated the survey, Coleman was mentioned considerably more often than Wilson.



In sporting goods, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the South—17%. *Source:* DSN/*Leo J. Shapiro & Associates*



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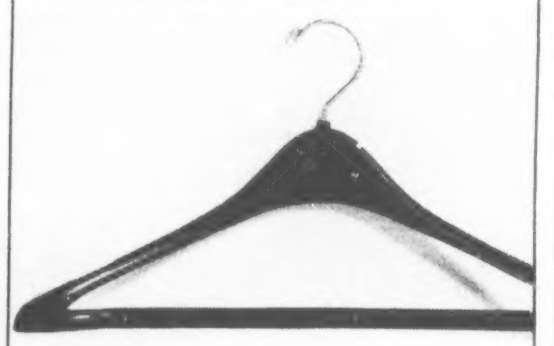

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Jeans-Oriented Producers Score

Men's Apparel

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Wrangler	57%	54%	69%
Lee	48	44	67
Fruit of the Loom	42	42	43
Levi's	31	25	65
Hanes	19	18	25
McGregor	12	13	6
Dickies	11	13	—
Jordache	9	10	—
Store brand/PL	4	4	—

Source: DSN/*Leo J. Shapiro & Associates*

Store Mgrs. Name Their Top Brands

Brands	K mart	Wal-Mart	Zayre	Target
Wrangler	44%	91%	39%	63%
Lee	24	14	45	66
Fruit of the Loom	46	60	49	39
Levi's	32	17	7	74
Hanes	9	43	5	22
McGregor	—	3	47	5
Dickies	2	38	22	—
Jordache	16	—	4	—
Store brand/PL	5	3	7	—

Source: DSN/*Leo J. Shapiro & Associates*

A perusal of the top brand list in men's apparel conjures up visions of a department awash in blue denim.

Five of the top eight brands are jeans-oriented suppliers; two are in the staple underwear/hosiery category. McGregor is the only top brand named which is represented in a typical men's department in a variety of sportswear classifications.

The jeans makers were clearly at the head of the pack with all store managers naming Wrangler and Lee as the top two brands.

Managers at the upscale chains suggested a closer race between three jeans makers. Among the upscalers, 69% mentioned Wrangler; 67% named Lee, and 65% named Levi's.

Levi's didn't fare as well in the responses from conventional chain store managers; 25% of them named this supplier as a best seller.

Jordache and Dickies were named as best sellers by managers at conventional discount chains.

Another Consideration

Another discrepancy between the conventionals and upscalers was in the underwear/hosiery supplier rankings. Fruit of the Loom fared well in upscale and conventional chain responses.

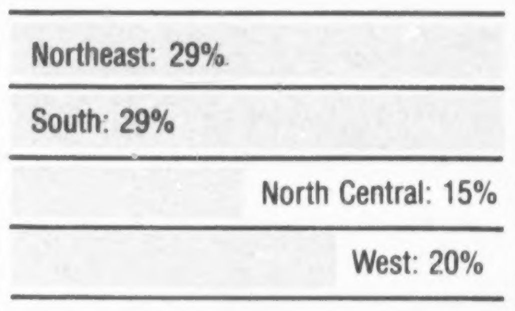
But, Hanes was mentioned as a best serller by 25% of the upscalers compared to 18% of the managers at conventional outlets.

Looking at the top brands from an individual chain vantage shuffles the list considerably.

The nod from K mart and Zayre managers went to Fruit of the Loom as the top-selling brand. Wrangler, mentioned by a whopping 81%, was named the top seller at Wal-Mart. Target's managers, 74% of them, said Levi's was at the head of the list.

The store brand/PL line didn't come up as strong in men's apparel as it did in ladies' apparel. Just 4% of all store managers and 4% of the conventional store managers named PL merchandise as a best seller. PL goods weren't mentioned as an important brand name factor by any of the managers at upscale chains.

Store managers from all regions named men's apparel as one of the departments in which the number of brands carried has increased during the past year. The branded lineup evidently grew more significantly in the Northeast and the South where 29% of the managers sited an increase in brands, compared to 20% in the West and 15% in the South.



In men's apparel, the most discount store managers citing an increase in the number of brands carried (1983 vs. 1982) were in the Northeast and South—each with 29%. *Source:* DSN/*Leo J. Shapiro & Associates*

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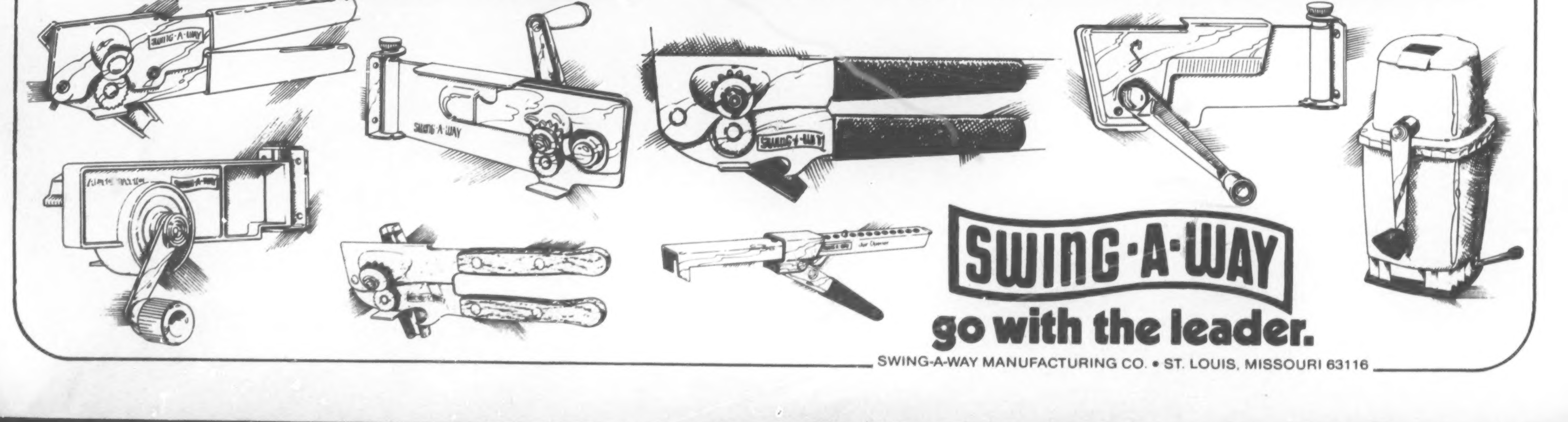

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SPECIAL REPORT: BEST

C merate in the Making: Pp. 11-77

Discount Store News®
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DECEMBER 12, 1983

Gift and fine tableware displays are highlighted with bold lighting and plush layout at Accents, K mart's new specialty venture in Birmingham, Mich. List prices are cut by up to 50%. (DSN photo)

K mart Tries Out Accents, Off-price Housewares Unit

BIRMINGHAM, Mich.—K mart is testing its hand in the off-price housewares business with Accents, its new 8,500-sq.-ft. discount specialty store which merchandises fine tableware and gifts to the hilt.

Accents is like two stores under one roof: The front half is sleek, gifty, high-service and heavily off-price; the rear spells basic discount self-service with its stackout displays of many housewares categories.

The up-front presentation, designed internally after three months of study, mimics the best of department stores and specialty shops with stark black walkways and ceiling and track lights played against multi-

(Continued on page 88)

Conservative Sales Boosts Seen For 1st Half by Chain Executives

Nationwide DSN Report

On the heels of the strong sales comeback posted by most chains this year, discounters were making solid—but conservative—projections for 1984.

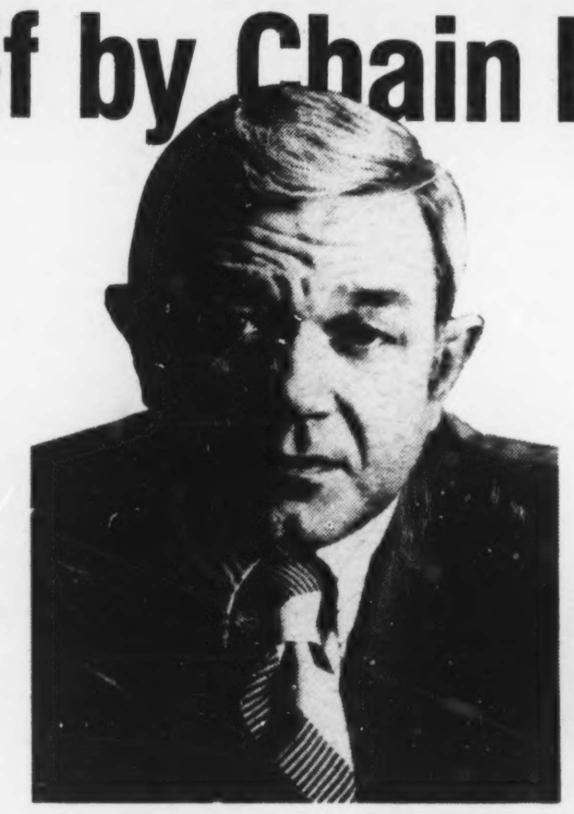
Even figuring in the economic burst which often comes with a presidential election year, discounters were keeping their same-store sales projections in the 6% to 10% range, and their inventory in line with last year.

"We're optimistic about 1984," reported David Glass, vice chairman, finance, Wal-Mart Stores. "We expect the strong fourth quarter of this year to carry forward into 1984."

Wal-Mart is looking for same-store gains of about 10% through the first half of next year, Glass said, with the chain looking to hit $5.8 billion next fiscal year.

"We see more discretionary dollars being spent," Glass noted. "People aren't so worried about losing their jobs the way they were earlier this year. We don't see any real problem. We expect inflation to hold to acceptable rates and we think interest levels won't be a deterrent to consumer spending."

Glass didn't see any one product category taking off. Rather, "the whole [growth] process is very broad based."



"The President is going to do what he can to make things rosy, but we've also got to look out for 1985."—Frank Brenton, president, Marshalls

"We don't foresee any major changes in our current program, although . . . we're continuing to watch the home computer area closely."—Peter Hayes, vp, Hills

"The President is going to do what he can to make things rosy, but we've also got to look out for 1985," said Frank Brenton, president of Marshalls. "We could have a worse recession during Reagan's second term."

The specialty apparel discounter is planning to increase its inventory levels slightly, although falling prices—most notably in designer jeans—are expected to hold its inventory investment at a stable rate, he said.

Brenton indicated that the chain's price points overall would rise, with changing merchandise that would bring in a number of upgraded categories.

Sales increases for the first quarter at Hills were pegged at

(Continued on page 4)

BEST

Unconventional Lewis Steers $2B Best's Diversification

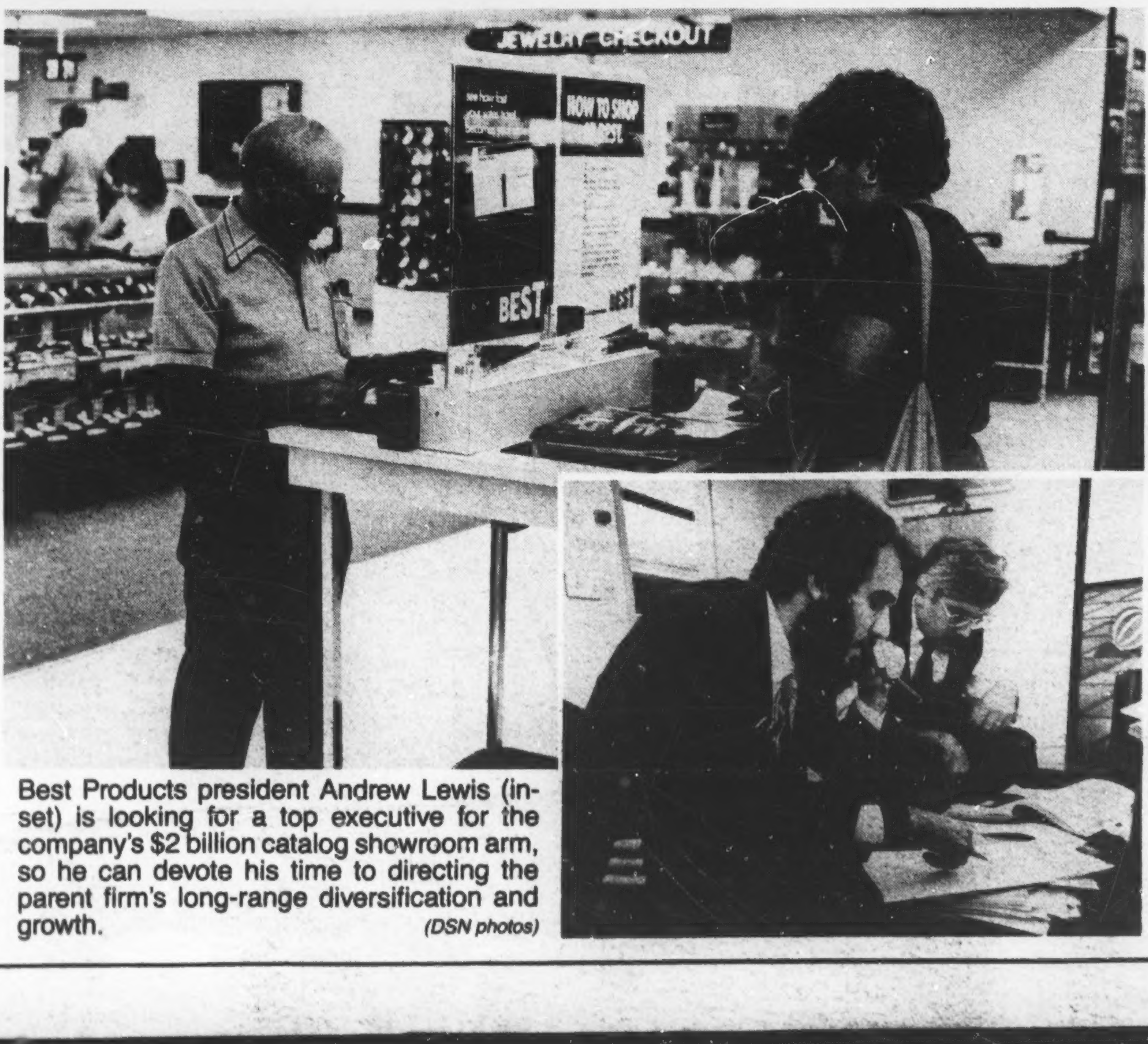
RICHMOND—Best Products is a retail conglomerate in the making.

On the corporate level, Best is diversifying, moving into specialty store retailing with a computer store operation, The Data Base, and a recently acquired ladies' specialty store chain, Ashby's. Further retailing thrusts are to be expected.

It is also diversifying within its catalog showroom operation. Still the company's heart and soul, Best has recast its basic showroom into many forms, developing a variety of formats to fit different market needs. These range from the 100,000-sq.-ft. MegaShowroom where some categories have been exploded into the equivalent of small specialty stores, to prototype 50,000-sq.-ft. to 65,000-sq.-ft. units, down to 12,000-sq.-ft. to 20,000-sq.-ft. mini-showrooms that warehouse the catalog mix but have sharply limited displays.

Andrew Lewis, Best Products' president, emphasized the revamping is still unfolding, and the full impact of all the

(Continued on page 12)



Best Products president Andrew Lewis (inset) is looking for a top executive for the company's $2 billion catalog showroom arm, so he can devote his time to directing the parent firm's long-range diversification and growth. (DSN photos)

By AL HELLER

RICHMOND—Seemingly unaffected by affluence and power, Andy Lewis remains a curious mixture.

For one, the 37-year-old president of $2 billion Best Products Co. jogs six miles at sunrise each day, yet smokes a handful of Jamaican Macanudo cigars at the office. And, despite growing up privileged and still prizing friendships with Andy Warhol and other artists, he says he prefers a middle-class life in Richmond, where his children attended public school when they were younger. Moreover, he and the Lewis family remain generous to outside charities.

Being colorful and practical, Lewis swings through Best showrooms several days each month to talk with employees at all levels. "Every president has a million people telling him how good things are," he said in an interview with *DSN*. "I'm interested in drawing out problems and assessing differences in how the company looks to us [at headquarters] and them [in the field]. Lots of changes we've

(Continued on page 87)

Modified Anticounterfeiting Bill Limits Mfrs.' Ability to Obtain Seizure Order

WASHINGTON—Final trademark anticounterfeiting legislation—peppered with new retailer "safeguards" designed to reduce discount chain opposition—passed Sen. Charles Mathias' (R-Md.) trademark subcommittee during the closing hours of the 1983 Congressional session.

But, the compromise bill pushed through by Mathias still faces a showdown early next year in the full Senate Judiciary Committee where lobbyists for NMRI, AGMC and individual discount chains are likely to maneuver for further changes.

The most significant modifications in the final subcommittee bill are aimed at resolving discount store industry concerns that brand name manufacturers would be free to engage in no-warning search-and-seizure harassment raids against price-cutting retailers under the pretext of seeking evidence against "traffickers" in counterfeit merchandise.

The version approved by Mathias' subcommittee late last month would continue to allow manufacturers to request "*ex parte*" (no notice) court orders permitting surprise raids on retail stores and warehouses.

But, in a key concession to discount industry critics of these provisions, Mathias agreed to accept a subcommittee staff draft sharply limiting the ability of manufacturers to obtain "*ex parte*" seizure orders.

As passed by the subcommittee, the bill specifically prohibits courts from issuing such no-warning search orders without evidence that the retailer targeted for the raid has "counterfeit goods" in his possession, and that the manufacturer would "suffer immediate and irreparable injury, loss or damage if the goods or materials aren't seized through execution of an '*ex parte*' order."

The revised bill further prohibits no-warning seizures of "business records" (such as chain invoices or purchase orders which could be used to track down supply sources), and requires manufacturers to post security bonds to reimburse retailers victimized by a "wrongful" search-and-seizure

(Continued on page 88)

Richmond Bow Due in April

Price Club to Invade East Coast

RICHMOND—The Price Club will make its East Coast debut here on April 2, 1984.

By the end of next year, at least three 100,000-sq.-ft. Price Club membership wholesale outlets will be up and running in eastern markets, according to Alan Werner, president of the Price Company East.

Construction of the first warehouse is now being completed on Richmond's West Side and plans are under way for the purchase of land in the Washington, D.C., market on which the second unit will be built. Werner wouldn't comment on possible locations for the third warehouse.

Both Richmond and Washington were targeted as viable locations for outlets when the East Coast spinoff of the Price Company was first formed in May of this year, said Werner. As the capital city of Virginia and site of a Federal Reserve office, Richmond, like Washington, has a large concentration of government employees—a major group targeted for Price Club memberships.

The Price Company East—62% of which is owned by Sol Price's original Price Company—will follow the same formula used in California and Arizona and use the Price Club name, said Werner. He and a group of investors own the remaining 38% of the Company.

As in the West, truckloads of goods will be delivered directly to the warehouse and stacked out on industrial shelving. Business members must show professional or resale licenses and pay a $25 annual fee to buy at wholesale prices. Group members must belong to a union or work at a bank, credit union or branch of government to purchase merchandise at 5% over wholesale.

One difference in the East Coast units may be the absence of a $15 per-year group membership fee, which was recently adopted in the Price Club units out West. Werner said the group membership fee was still under discussion at presstime. He explained the fee wasn't applied by West Coast units when they first opened and therefore may not be applied by the East Coast stores "at this point in time."

Location Named

Werner said he will follow the same practice of sticking to low-rent areas for the East Coast Price Club units. In Richmond, the Club will be located across the street from a Thalheimer's warehouse, which also serves as a retail outlet, and down the street from a Circuit City Super store—another warehouse-type operation.

Werner refused to disclose membership figures or make projections for the Richmond unit. He did say sales are expected to follow the same patterns as in the existing Price Clubs, which have grown past $50 million per unit annually.

Paysaver Is Latest Cataloger To Test Jewelry/Giftware Store

CHICOPEE, Mass.—Paysaver has become the latest cataloger to test a jewelry and giftware specialty store by opening a 3,000-sq.-ft. Ultima Jewelers in downtown Springfield, Mass.

The cataloger has also acquired the assets of Value Mart, a troubled Pittsfield, Mass., showroom as its fifth full-line store.

These moves last month came as the cataloger completed plans to relocate its headquarters from Chicopee to a new 31,000-sq.-ft. office and central warehouse in West Springfield, Mass., early next year.

That step was triggered by the impending sale of Polep Candy & Tobacco, a tobacco, candy and grocery jobber that founded Paysaver in 1961, to Heller, White & Co., a New York-based holding company.

As a result of that sale, due to be finalized at presstime, Charles L. Polep will give up his post as president of the tobacco jobber (but continue as a director) and remain with Paysaver as president. His son, James A. Polep, Paysaver vice president, will become senior vice president.

Mortimer A. Polep continues as Paysaver chairman and will become chairman of Polep Candy & Tobacco; his son Jeffrey Polep becomes president. Charles and Mortimer Polep are brothers.

The Ultima Jewelers store, which is across from the Baystate West Mall and office tower, features all the jewelry and giftware in the Paysaver catalog along with additional not-in-catalog goods. "If we are successful with Ultima," Charles

(Continued on page 86)

Ailing Cook United, Closing 16 Stores, Ups Apparel Effort

By ARTHUR MARKOWITZ

MAPLE HEIGHTS, Ohio—In an effort to regain its profitability, Cook United next year will increase its efforts in the merchandising area, including revamping six Cleveland stores with a stronger soft goods look as a key step.

This year the discounter mainly focused on financial concerns. They included (a) negotiating a new three-year $23 million revolving line of credit used exclusively to purchase soft goods from reluctant vendors; (b) deferring payment of the principal on current debt of about $3 million, and (c) phasing out at presstime of 16 "outpost" stores to improve the company's liquidity through the projected saving of about $20 million in inventory costs.

A number of financial moves still have to be completed, including obtaining waivers of covenant requirements concerning the company's net worth, and the projected presstime sale of Boston Distributors, Cook United's last wholesale operation.

Developing a more profitable merchandising posture has been an ongoing concern for the discounter. The latest effort was sparked by Russell A. Hansen, who was hired as the company's top executive six months ago. At that time he said that he would strengthen the merchandising of lines that appealed to women shoppers, such as apparel.

Noted Background

Hansen, who filled the post of president that had been open for the four previous months, was a retired K mart veteran with a soft lines background. Among his endeavors was involvement in developing K mart's Designer Depot off-price apparel chain.

As part of the terms of Hansen joining Cook United as president, board chairman and chief executive officer, he named three new board members, one of whom was S. Polly Shaine, a consultant in the fashion merchandising field. She had served as senior vice president and general merchandise manager of Venture and before that as vp and gmm for all apparel at Bradlees.

A Cook United source said: "We wouldn't destroy our image of being a hard goods discounter, but we will try and improve the soft goods sales ratio of our mix. Historically, apparel and domestics together accounted for 15%-20% and we'll be inching up slowly. I think we want to be at 25%-30% in another year."

The Cleveland stores' revamping will spot apparel and accessories in the front of the units, using the latest fixtures for a "more modern presentation," he said.

Related to Other Move

The look will be similar to that used in upgrading Cook United's CSC logo stores in Louisville, Ky., in 1982. That reformatting gave the units a fashion image, and in the apparel areas featured the use of circular racks, waterfalls and other specialty displayers in place of the straight runs previously used.

The CSC effort was geared to boosting apparel sales without changing the ratio of floor space devoted to hard lines and soft goods.

Cook United doesn't plan to change the footage ratio in the Cleveland stores. However, the source noted: "It will be necessary to somewhat shrink the hard goods assortment so we can increase our turns." Merchandise redundance will be cut so that less sku's will be carried for a narrower but deeper mix.

Cook United has 13 Uncle Bill's logo stores in the Greater Cleveland market. Six on the East Side will be revamped by April 1 as a major test in developing a fashion look for the discounter. (The company also uses Rink's, CSC, Cook's and Clark's as its logos in various markets.)

The discounter is banking on strengthening apparel merchandising as a key to a turnaround in 1984. It has written off 1983 and expects to close the fiscal year (ending Jan. 28, 1984) with a loss.

Hansen's predecessor as chairman and ceo, Harry M. Broder, forecast at the company's annual meeting June 14, 1983, that "we still believe that fiscal 1983 will be profitable."

Broder took over as chairman and ceo in early Febru-

(Continued on page 4)

Stores Prosecute Thieves More, Boost Conviction Rate

NEW YORK—Mass merchandisers and other retailers are getting tougher with thieves, and it's paying off.

Prosecutions by mass merchandisers, as a percentage of apprehensions, rose to 61% in 1982 from 47% in 1981, according to a survey conducted for the National Mass Retailing Institute by Arthur Young & Co.

Convictions as a percentage of prosecutions by mass merchandisers rose from 73% in 1981 to 84% in 1982; as a percentage of apprehensions, convictions climbed from 34% to 51%.

These findings reflected the overall retail trend. (The study summarized responses from 180 retail organizations with more than 36,000 locations and sales close to $97 billion.)

Errol Cook, a partner in Arthur Young, said that in 1982 87% of those prosecuted by all types of outlets surveyed—mass merchandisers, department stores and specialty stores—were convicted, vs. 77% in 1981. Overall, prosecutions as a percentage of apprehensions went from 48% in 1981 to 61% in 1982. Convictions as a percentage of apprehensions rose from 37% to 53%.

The increasingly tough attitude of retailers reflected the problem: Shrinkage rates gained an average of 10% in 1982, resulting in a loss of $2.13 billion for the responding companies. To further battle the rising problem, retailers put improved employee education at the top of their plans.

According to the survey, 91% of the mass merchants, 86% of department store executives and 84% of the specialty store operators targeted employee education as a weapon against shrinkage that should be sharpened.

(Continued on page 88)

How Retailers Teach Shrink Control

	Mass Merchandisers	Department Stores	Specialty Stores	Overall Average
To security personnel:				
Films/Videos	64%	91%	37%	62%
Formal Classes	50	74	28	49
In-store Training	90	97	80	89
Training Manual	79	79	63	74
Other Methods	16	9	20	16
None	6	3	13	8
To nonsecurity personnel:				
Films/Videos	68	80	33	59
Formal Classes	38	54	30	39
In-store Training	86	80	88	85
Training Manual	60	23	61	53
Other Methods	8	0	7	6
None	1	3	2	2

Note: Many retailers use more than one type of orientation program. Therefore, percentages don't add up to 100.

Source: Arthur Young & Co., for NMRI

Modified Bill Curbs Mfrs.' Ability to Get Seizure Order

(Continued from page 3)

raid.

Discounters who are subjected to a groundless "*ex parte*" search would be entitled to damages for lost profits, as well as for "good will" lost because of a manufacturer's "publicizing of a seizure that is determined to have been wrongful."

The "compromise" version approved by Mathias' subcommittee doesn't trim the stiff new criminal penalties for "traffickers" in counterfeit goods (five years in prison plus up to $1 million per offense) which have been criticized by some industry lobbyists as "excessive."

Like earlier versions, the final measure defines counterfeit merchandise as goods bearing "a spurious mark which is identical to or substantially indistinguishable from a genuine" trademark.

Both AGMC and the broadly based American Retail Federation have raised serious concerns about this "vague" definition, warning that the anticounterfeiting penalties could be used as a weapon against "private label products, generic drugs and other beneficial trade practices."

Even so, lobbyists for NMRI expressed general satisfaction with the subcommittee's version, noting that "most, if not all, of the comments NMRI made in the past have been incorporated into the new bill."

Although "the legislation isn't something we positively desire, we hope that we have smoothed out most of the rough edges in it," NMRI Washington representative Endicott Peabody told *DSN*.

"With some further changes" which NMRI will seek when the full judiciary committee takes up the bill early next year, it "should be legislation that established discount retailers needn't fear," Peabody said.

In contrast, AGMC told Congress that despite the subcommittee-approved improvements its chain members remain "deeply concerned".

In addition to the continuing problem of the bill's "overbroad" definition of counterfeit products, the Washington-based industry group warned that the new version offers little protection for retailers who unintentionally purchase bogus merchandise.

Moreover, since the legislation still doesn't require manufacturers to prove that a retailer has counterfeit goods in his possession before obtaining an "*ex parte*" search order, the new language remains insufficient to protect discount chains from no-warning harassment.

Although AGMC provided Congress with a number of major proposed "improvements" in the subcommittee-passed version, NMRI's list of suggested changes was considerably narrower.

In a letter to Mathias, NRMI lobbyists characterized their remaining concerns as involving only "a few small points" in the subcommittee-passed version. The most far-reaching of these "small" changes requested by the association, however, would largely exempt discount stores from the search-and-seizure provisions by focusing such remedies on "fly-by-night" operators.

K mart Tries Out Accents, Off-price Housewares Store

(Continued from page 1)

tiered glass shelf displays angled to enhance traffic flow.

Although Accents sells fine brand-name items here that wouldn't usually be sold directly to discounters, K mart claimed it is able to buy 95% of the store's goods direct and encountered no out-of-stock problems during last month's grand opening week.

Even including the basics housewares categories, 60% of Accents' vendors are reportedly new to the chain. K mart strove to buy branded items that aren't in its conventional discount outlets, although some initial overlap occurred because of the speed of the store's opening. "Those [38] items will be phased out by the end of 1983," said Patrick Padden, general manager of Accents, Kresge and Jupiter stores.

Despite Accents' marked departure from K mart's regular business, and the massive efforts made to position the store as a unique, high-service, off-pricer of fine tableware and gifts, company officials insisted that no similar stores are planned, nor is Accents a test before adding fine items to conventional K mart discount stores.

The chain, they said, is merely taking advantage of a local market void and a long-term lease in a prime location. Being just five miles from company headquarters in Troy, Accents can be watched closely.

K mart spent $250,000 to convert, in just seven weeks, a former Kresge variety store—which spokesmen said had been profitable—in order to open in time for the Christmas selling season.

Accents opened with overall prices 10%-40% lower than local retail competition, according to Padden. Notable grand opening promos included: 40% off list on Waterford goblets and wineglasses, 20-piece Wedgewood bone china dinner sets, Royal Doulton figurines, Lenox place settings and serving bowls, and Belleek accessories; 50% off Oneida silverplate or stainless steel flatware; 30% off Hummel figurines and Lladro sculptures.

Plans Aired

Padden said Accents will heavily discount "at least one fine tableware and gift category at all times, but none will be footballed."

Adding to the appeal of the store's front half, calligraphic shelf signs denoted heavy price discounts on selected goods. Moreover, Accents special-orders fine tableware patterns not in stock, establishes no minimum purchase for credit card use and giftwraps.

High service levels will continue "because Birmingham shoppers expect it," said Padden. Accents employs 23, about 75% on a full-time basis.

The store's rear half is designed to be self-service, with most products ribbon-displayed on bare-bones fixturing. Here, Accents aims for a quality image with its in-line assortment of highly recognizable brand names like Libbey glassware, boxed Corning cookware sets and General Electric space-saving small appliances.

Accents also ribbon-displays Durand salad sets, Anchor Hocking punch bowl sets, Country Village stoneware and Farberware sets near heavy traffic aisles.

From perimeter walkways, customers can easily browse in separate sections of decorative brassware, barware and extensive wicker displays. Toward the rear, shoppers see a well-planned, 12-ft. wall display of kitchen gadgets, a rear wall of silk flowers and a service desk for custom arrangements.

Manufacturer displays and overhead signs are totally absent from the store.

Underscoring Accents' multiple price-point approach in basic housewares, the store advertised 20-piece Country Village stoneware sets at $33.88, compared with secondary brands at $16.88-$19.97. Handcrafted wicker baskets started at $5.97, while large 3-piece storage sets sold for $109.91. Kitchen gadgets ranged from $1.96 to $6.44.

Stores Prosecute Thieves More, Boost Conviction Rate: Poll

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Retailers also agreed they should plan more efficient accounting or paperwork systems, better screening of employees and tougher controls at the registers.

During 1982, mass merchandisers had the largest increase in shrinkage—15.8%—which rose to 2.2% of sales. Department stores reported a 13% rise to 2.6%. Specialty stores, however, reported a drop in shrinkage to 1.8% from 2% the previous year.

The overall upward trend in shrinkage followed two years of flat results, said Cook. The 1982 rise is seen, in part, as a result of the recession, and is expected to reverse as the economy picks up, Cook explained. Mass merchandisers spent an average of 1.4% of sales on security during 1982. Department stores and specialty chains spent 0.7% and 0.5%, respectively.

Although mass retailers used mirrors, locks with chains and guards as security devices most often in 1982, Cook sees a trend toward higher-tech equipment among mass merchants. "There is currently an increase in the use of tags and POS devices that tie in with state-of-the art technology."

According to the 1982 report, 54% of mass merchants use POS equipment to fight shrinkage and 34% use magnetic tags; 78% of department stores use POS devices and 64% use magnetic tags.

For their part, mass retailers plan to push employee education, to fight pilferage, with videos, films, classes and manuals; 72% reported continuing training programs on shrinkage control for both security and nonsecurity personnel during 1982.

According to the report, the breakout of losses remained consistent with past results. Employee pilferage stayed high, accounting for 50% of total losses; shoplifting comprised 30% and poor paperwork control, 20%.

For mass merchandisers, the highest instance (43%) of employee theft took place at the register among cashiers; the second highest instance was among floor personnel. At department stores, most employee apprehensions (47%) took place among selling floor personnel and the second highest employee thefts were among cashiers.

K mart Sues Rachel Perry For $1.8M, Alleging RPM Conspiracy

(Continued from page 2)

complaint alleged.

In addition, K mart charged Perry with engaging in "discriminatory promotional" schemes in violation of the Robinson-Patman Act.

Specifically, K mart alleged that Perry never offered it any cooperative advertising allowances, promotional credits, or any payment for services and facilities made available to "full-price" stores that sell the same Perry cosmetics.

The complaint asked the courts to prohibit Perry from fixing retail prices and from engaging in any activities which discriminate against K mart's ability to purchase the cosmetics.

According to K mart lawyers, Perry's alleged RPM conspiracy dates back to at least 1980 when the firm "adopted a policy to protect department stores and other retail outlets from the price competition of discounters."

As part of that policy, "Perry requires distributors and retailers to agree that they won't sell Rachel Perry natural skin care, body care, and makeup products to any retailers not authorized" by the company, the chain charged.

Perry's memo to distributors stated that its prohibition against sales to "discount stores" specifically included "mass merchandisers such as K mart."

Moreover, the cosmetics manufacturer warned distributors that "it is contrary to our marketing program to have the product line appear in such an environment" and that "if it is learned that Rachel Perry products are included in 'discount store sets,' the possibility of termination exists," K mart told the court.

Significantly, the chain argued that Perry went beyond merely refusing to sell to discounters—a practice which isn't necessarily prohibited under the Federal antitrust laws.

Among other things, the manufacturer "established a surveillance system to ensure compliance" with its RPM conspiracy by independent distributors and nondiscount retailers, K mart maintained.

"Under this surveillance system, when Rachel Perry is informed or learns that a distributor is selling or offering to sell its" H&BA products "to K mart or other discounters, it has threatened to terminate" these firms, the chain told the court.

As a result of these practices K mart stores in some areas have been unable to obtain the Rachel Perry line at all, while units in other parts of the country have "had to pay a higher price" for these products, the discounter maintained.

In addition, some distributors "have delayed shipments and have otherwise sought to harass and interfere with K mart's sales of Rachel Perry" H&BA items, and the chain "has suffered injury to its goodwill and reputation" as a result of these activities, the company's attorneys charged.

Mays Would Speed Ch. 11 Payments

(Continued from page 2)

creditors to a total of 33% of their claims on confirmation of the plan.

The discounter is currently negotiating to lease or sell the Fishkill store which co-anchors the Dutchess Mall with a Service Merchandise catalog showroom.

Dutchess Mall Associates II claims it suffered almost $4.8 million in damages from Mays' closing of the Fishkill store.

Should the Dutchess Mall Associates II claim be disallowed in full before confirmation of the plan, unsecured creditors will receive another 11% repayment of their claims for a total of 44% on the first distribution date of their claims.

A hearing of the dispute between Mays and Dutchess Mall Associates II was due at presstime.

If the plan is approved by creditors, distribution dates would then be set.

Mays, in the plan's disclosure statement, noted that if the reorganization isn't approved and a liquidation is carried out, only $5 million would be available for unsecured creditors.

The statement also disclosed that the liquidation sale carried out in the five stores closed by Mays in the spring of 1982 by Wisconsin Toy & Novelty generated approximately $4.3 million for the discounter.

A breakdown of claims and expenses shows that secured creditors have claims totaling almost $12.1 million; other priority claims amount to $3.4 million; unsecured claims (excluding disputed claims) come to $6.5 million; unpaid administration expenses, $800,000, and expenses of administration for goods and services during the Chapter 11, almost $3.4 million.

The repayment plan calls for interest at the rate of 10% to accrue to creditors after the second year of the plan's operation, but to be paid at the end of the fifth year.